



Metadata Dictionary and Usage Guide
(Version 4)



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Abstract

The purpose of this dictionary and best practices guide is to assist organizations participating in the New York Heritage Digital Collections project as they create metadata for their digital items. It strives to ensure consistency and quality control across the collections which, in turn, will result in a better experience for users. Quality metadata make it more likely that end users will find digital items, especially when the data is repurposed with other online digital collections. Moreover, consistent metadata expedites the process of getting your materials into the [Digital Public Library of America](#) (DPLA) through our partners at the [Empire State Digital Network](#). Use this dictionary to determine definitions, how and where to enter metadata, and to better understand what types of terms should be used.

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Version 4: Change Report

Version 4 of the Metadata Dictionary and Best Practices Guide represents a substantial change from the previous version. These changes reflect the best practices within the field, and may affect your local practice.

- Changed sub-title from *Metadata Dictionary & Description Guide* to *Metadata Dictionary and Best Practices Guide*.
- Changed document formatting and style to reflect new logo and site branding.
- Edited [General Guidelines and Instructions](#)
 - Added explanatory text re: use of semicolons and spaces: *“These are called “delimiters” and are needed to parse metadata when it is being repurposed.”*
 - Changed text from: *“Do not use carriage returns, tabs, or HTML tags in the metadata fields.”* to *“Do not use carriage returns or tabs in the metadata fields.”*
 - Added text: *“If you upload video or audio recordings, you may wish to place a copy of the file in an external resource such as the Internet Archive or YouTube. For more information, see Recording Oral Histories for NY Heritage¹.”*
- Added Rightsstatements.org and the Digital Public Library of America to [Acknowledgements](#).
- Added Rightsstatements.org to [Controlled Vocabulary Source Lists](#)
- On the Metadata Field Element Chart:
 - Renumbered field elements to reflect changes on the chart.
 - Phased out field **5. NY Heritage Topic** for use at the item level. This will be used for collection-level metadata going forward. See [New York Heritage Topic](#).
 - Changed Dublin Core mapping for field [Date of Original](#) from *“Date”* to *“None”*. This is also reflected in the Metadata by Field description for this field.
 - Changed Dublin Core mapping for field [Hidden Date](#) from *“None”* to *“Date”*. This is also reflected in the Metadata by Field description for this field.
 - Phased out field **11. Time Period**.
 - Added field 13. [Relation](#). This is also reflected in the Metadata by Field description for this field.
 - Changed Dublin Core mapping for field [Identifier](#) from *“Identifier”* to *“None”*. This is also reflected in the Metadata by Field description for this field.
 - Changed Dublin Core mapping for field [Collection ID](#) from *“None”* to *“Identifier”*. This is also reflected in the Metadata by Field description for this field.
 - Added field 27. [Citation Information](#). This is also reflected in the Metadata by Field description for this field.
 - Changed Suggested Controlled Vocabulary for field 26. [Rights](#) from *“None”* to *“Rightsstatement.org”*. This is also reflected in the Metadata by Field description for this field.
- On the Metadata Details by Field section:
 - Added note to the [Title](#) field about the new website automatically sorting items by date.

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<https://docs.google.com/document/d/1oH-4JHh5F9iUudRUcRJ9qa-cKhM93H-CNXPJGafYIM0/edit#heading=h.175xpge30uq9>

- Added text to bullet describing rules for use of [Creator](#) field: *“The person giving the interview is added to the [Contributor](#) field with the relator term [Interviewer](#).”*
- In [Subject](#) field Controlled Vocabulary lists, added VIAF: <https://viaf.org>
- Deprecated NY Heritage Topic.
- In [Contributors](#) field Controlled Vocabulary lists, added VIAF: <https://viaf.org>
- Deprecated Time Period.
- Added bullet to text describing [Physical Format](#):
 - *Use only one.*
- Added bullet to text describing [Physical Description](#):
 - *This field generally refers to the whole object and need not be applied at the page level.*
- Removed examples of TGM form/genre terms from the [Physical Description](#) field.
- Added bullet to text describing [Local Location](#):
 - *Field may be hidden if organization would like to include location information but does not want this to be made public for security reasons. Please note that if the field is hidden, this will hold true across all items and collections owned by your institution. The default for this field is public if populated, so please discuss hiding the field with your local council administrator.*
- Added [Relation](#) field.
- Added bullet text to Format of Digital:
 - *“Information about the digital master or archival file can be recorded as [Technical Data](#).”*
- Added text to bullet point on [Collection ID](#): *“Your local council administrator may require a description of each Digital Collection prior to establishing the Collection ID in the local controlled vocabulary.”*
- Removed bullet discussion describing [Library Council](#). Added a controlled vocabulary as [Appendix D](#).
- [Rights](#) field has been completely rewritten to reflect changes happening across the industry. See field for details.
- Added field [Citation Information](#).
- Added Part II: Creating Contextual Metadata. **Note: this is a major change reflecting the redesign of the New York Heritage Digital Collections website. All contributors are advised to read and discuss these changes with your local council administrators.**
- In Appendices:
 - Reordered appendices to reflect order used in this guide.
 - Updated [Appendix A](#) and [Appendix B](#) to better reflect formats used by contributors.
 - Added [Appendix D: County List by Council](#).

Part I: Describing Digital Items

General Guidelines and Instructions

- The term “item” is used throughout the dictionary. An “item” can be a number of different things including a photograph, a photo album (filled with many photographs), a journal, a diary, an account book, a published book, a recorded oral history, a chair, etc.
- When you include an item in the CONTENTdm Project Client, be sure that all “Mandatory for Upload” fields are filled in or CONTENTdm will not allow you to upload for approval.
- An item must have a unique title. If there are multiple items with the same title, additional information is needed to make each title unique. For example:

Correspondence: Boston 1; Correspondence: Boston 2;
Correspondence: Boston 3

or

Correspondence: Boston April 1860; Correspondence: Boston May 1860; etc.

- Be consistent in your use of the metadata fields.
- Do not use a metadata field for anything other than what it was intended. Cross-collection searching will not function properly if metadata fields are used inconsistently.
- If you find that you have a need that is not met by the existing metadata fields, contact your library council for assistance.
- If you have no data for a metadata field, leave it blank. Exceptions: [Creator](#) and [Date of Original](#), in which case, write unknown.
- Some metadata fields will let you enter multiple values, but you must separate them with a *semicolon* and *space* (these are called “delimiters” and are needed to parse metadata when it is being repurposed). For example:

buildings; automobiles; animals
- Do not use carriage returns or tabs in the metadata fields.
- If you upload video or audio recordings, you may wish to place a copy of the file in an external resource such as the Internet Archive or YouTube. For more information, see [Recording Oral Histories for NY Heritage](#)².
- If you have any other questions please contact your library council for guidance.

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<https://docs.google.com/document/d/1oH-4JHh5F9iUudRUcRJ9qa-cKhM93H-CNXPJGAfYIM0/edit#heading=h.175xpge30uq9>

Acknowledgements

The following projects served as models and templates for the information contained in the New York Heritage Metadata and Best Practices guide:

- Hudson River Valley Heritage (<http://www.hrvh.org>) and the Southeastern New York Library Resources Council
- Minnesota Reflections (<http://www.mndigital.org/reflections/>) and the Minnesota Digital Library
- [Rightsstatements.org](https://rightsstatements.org) and the Digital Public Library of America (<https://dp.la>)

Controlled Vocabularies

A controlled vocabulary is a list of standardized terms. Using a controlled vocabulary ensures consistency and improves the quality of search results. When a controlled vocabulary list is provided for a metadata field, select a value from that list. *For example*, when adding a subject to your item, choosing the approved term `fire fighters` from the Library of Congress Subject Heading list instead of the unapproved term `firemen` will help users find your materials without making multiple searches for synonyms.

Using Controlled Vocabularies

A controlled vocabulary list is provided for the [Library Council](#), [Physical Format](#), [Type](#), [Format of Digital](#), [Language](#), and [Rights](#) metadata fields. These are referred to as NY Heritage Lists in the Metadata Field Element Chart. You MUST select an existing value from these lists. Do not add new terms to these controlled vocabularies.

For other fields, if the term you want is not found in the abbreviated controlled vocabulary list within the CONTENTdm Project Client, check the complete listing for that controlled vocabulary for the term you want. You can find the complete listings in the [Controlled Vocabulary Source List](#).

The [Controlled Vocabulary Source List](#) contains URLs to the controlled vocabulary. If an appropriate term is found in the complete list, add the new term to the record. This new term, once approved in CONTENTdm, will be added to your controlled vocabulary for that metadata field.

For example, the Thesaurus for Graphic Materials ([TGM](#)) from the Library of Congress is very useful for assigning both topical and form/genre subject terms to visual material. The TGM is one of the controlled vocabularies that come packaged with the CONTENTdm software but is abbreviated. You may need to access the full TGM source list to find other terms. TGM's source list can be found at <http://www.loc.gov/rr/print/tgm1/toc.html>

If there is an appropriate term that is not included in the field's controlled vocabulary, you may include it in the [Description](#) or [Title](#) fields to ensure that a keyword search will find the item.

Multiple Controlled Vocabularies

If you are using more than one Subject controlled vocabulary, you will need to create more than one Subject metadata field in CONTENTdm.

For example, you may want to use [TGM](#) because it is the most appropriate to describe your digital images, but also want to use the Library of Congress Subject Headings [LCSH](#) because your library already described the images with that controlled vocabulary in earlier cataloging, or you find LCSH more suitable to describe textual materials. Use Subject.TGM for the initial [Subject](#) metadata field, and add another field called Subject.LCSH to accommodate the other, distinct controlled vocabulary.

Creating Controlled Vocabularies

CONTENTdm allows you to create new controlled vocabularies using a local list. A controlled vocabulary unique to your collection may be created to speed up data entry and ensure consistency.

For example, with [Digital Collection](#) set as a controlled vocabulary with a local list, users can be sure that all records will use the same `Canastota Early Businesses Collection` and not any variations like `Canastota Early Business Collection` or `Early Businesses Collection`.

CONTENTdm will only search phrases as exact strings of words if the metadata field has been set up as a controlled vocabulary and is searchable. Otherwise, each single word of the phrase will be separately hyperlinked.

For example, using a local list as a controlled vocabulary for the [Holding Institution](#) field allows users to click on the institution's name to retrieve all items from that institution because the full name, `Geneva Historical Society` will be searched instead of `Geneva`, `Historical`, or `Society`.

Controlled Vocabulary Source Lists

Acronym	Full Name	Application
AAT	Art & Architecture Thesaurus http://www.getty.edu/research/tools/vocabularies/	Bundled with CONTENTdm Appropriate for: Subject
DCMI	Dublin Core Metadata Initiative Type Vocabulary http://dublincore.org/documents/dcmi-type-vocabulary/	Bundled with CONTENTdm Appropriate for: Type
ISO 639-2	International Standard for language codes http://www.loc.gov/standards/iso639-2/php/code_list.php	Appropriate for: Language
LCNAF	Library of Congress Name Authority File http://authorities.loc.gov/ (Part of the Library of Congress Authorities website)	Appropriate for: Creator , Subject , Contributors , Publisher of Original
LCSH	Library of Congress Subject Headings http://id.loc.gov/authorities/subjects.html (Part of the Library of Congress Authorities website)	Appropriate for: Subject , Location
MeSH	Medical Subject Headings http://www.nlm.nih.gov/mesh/	Bundled with CONTENTdm Appropriate for: Subject

MIME	Internet Media Types (IMT) http://www.iana.org/assignments/media-types/index.html	Appropriate for: Format of Digital
-----	Rightsstatements.org	Set up by NYH for users Appropriate for: Rights
TGM	Thesaurus for Graphic Materials http://www.loc.gov/pictures/collection/tgm/	Bundled with CONTENTdm Appropriate for: Subject
TGN	Thesaurus of Geographic Names http://www.getty.edu/research/tools/vocabularies/tgn/index.html	Bundled with CONTENTdm Appropriate for: Location
ULAN	Union List of Artist Names http://www.getty.edu/research/tools/vocabularies/ulan/index.html	Bundled with CONTENTdm Appropriate for: Creator , Contributors
VIAF	Virtual International Authority File https://viaf.org/	Appropriate for: Creator , Subject , Contributors , Publisher of Original

Additional CONTENTdm-Based Controlled Vocabularies

<p>Local List Lists created for specific collections.</p>	<p>Created from existing content in the field. A Local List can be one created by several Councils, a Council, or by an Institution.</p> <p>Appropriate for: Collection ID, Digital Collection, Holding Institution</p>
<p>NY Heritage List A controlled vocabulary list created by NY Heritage.</p> <p>Do not add to or alter this kind of list!</p>	<p>Imported from the NY Heritage server.</p> <p>Appropriate for: Physical Format, Library Council</p>

Metadata Field Element Chart

Field Name	Map to Dublin Core Schema	Mandatory for Upload	Best Practice	Suggested Controlled Vocabulary
1. Title	Title	Yes	Yes	None
2. Description	Description		Yes	None
3. Creator	Creator		Yes	LCNAF; ULAN; VIAF
4. Subject	Subject		Yes	LCSH; LCNAF; AAT; TGM; MeSH; VIAF
5. Location	Coverage-Spatial		No	LCSH; TGN
6. Contributors	Contributor		No	LCNAF; ULAN; VIAF
7. Publisher of Original	Publisher		No	LCNAF
8. Date of Original	None		Yes	None
9. Hidden Date	Date		Yes	ISO 8601 W3CDT
10. Physical Format	Format		Yes	NY Heritage List
11. Physical Description	Source		Yes	None
12. Local Location	None		No	None
13. Relation	Relation		No	None
14. Type	Type		Yes	DCMI
15. Language	Language		No	ISO 639-2
16. Format of Digital	None		Yes	MIME
17. Identifier	None		Yes	None
18. Collection ID	Identifier	Yes	Yes	Local List
19. Holding Institution	None		Yes	Local List
20. Contact Information	None		Yes	None
21. Publisher of Digital	None		Yes	None
22. Date of Digital	None		Yes	ISO 8601 W3CDT
23. Digital Collection	Relation-is Part Of		Yes	Local List
24. Library Council	None		Yes	NY Heritage List
25. Notes	None		No	None
26. Rights	Rights	Yes	Yes	RightsStatements.org
27. Citation Information	None		Yes	Local list & additional info as needed
28. Technical Data	None		Yes	None
29. Transcript	None		No	None
30. Latitude	Coverage-Spatial		No	None
31. Longitude	Coverage-Spatial		No	None
32. File Name	None	Yes	Yes	None

Metadata Details by Field

1. Title

NY Heritage Label:	Title
Maps to Dublin Core:	Title
Definition:	The name given to the item.
Comment:	Typically, Title will be a name by which the item is formally known.
Mandatory for Upload:	Yes
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary:	None

- An item must have a brief, descriptive, and unique **Title**.
- The **Title** may be transcribed from the item itself (book title, photograph caption, artist's title, item name, etc.). Frequently items won't have a formal title and a title will need to be supplied. It is recommended that supplied titles not be enclosed in brackets.
- Omit initial articles at the beginning of a title (The, An, A, etc.) because CONTENTdm sorts and displays items in ascending alphanumeric order by title.
- The new website is automatically set up to display items in date order when linked to from collection landing pages. If you want your items to fall in chronological order when sorted by title, create titles with dates in the YYYY-MM-DD format. For example: *Newsletter, August 1913* will come before *Newsletter, July 1913* but *Newsletter, 1913-07* will properly appear before *Newsletter, 1913-08*
- If the item has a caption but a different title is supplied, the caption may be included in the [Description](#) field.

Example:	Comment:
Grant of John Baker 1468-1470	Parchment
Delaware and Hudson Railroad Train	Photograph
Bi-Centennial Special Excursion Ticket	Ticket
Western Gateway 1937 from West	Postcard
Halfmoon Tax Collector's Notice, Halfmoon, NY, 1928	Broadside
Correspondence: Boston, 1913-08 - weather	Letter
John Doe Oral History Interview	Oral history

2. Description

NY Heritage Label:	Description
Maps to Dublin Core:	Description
Definition:	An account of the content of the item.
Comment:	Examples of Description include, but are not limited to: an abstract, table of contents, reference to a graphical representation of content or a free-text account of the content.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary:	None

- The Description field is used for a free-text account of the intellectual content of the original item. For this reason, the content in the Description field can be a little longer than in other fields. It can be taken from the original item or created by the cataloger. Captions or inscriptions that are not used in the [Title](#) field may be included in the Description field. *For example*, inscription on original reads: Having a great time in Niagara Falls! -Bess
- The free-text account in **Description** should only describe the item itself. Other background or contextual information may go in the [Notes](#) metadata field.
- You may want to include keywords in your text that end users will likely search on that are not already indexed in a [Subject](#) field or included in other fields. *For example*, A photograph of trolleys would have street railroads in the subject field using the Thesaurus for Graphical Materials ([TGM](#)). The more common word, trolleys, could be included in the Description field (and/or the [Title](#) field).
- The **Description** field may include information that a user will be able to see in the item. *For example*, is this a view of the Hudson River? Was the photograph taken from the future site of a bridge? Does the building no longer exist? Is it an aerial view?

Example:	Comment:
View of Fort Plain, the Erie Canal, and the Mohawk River mid 1800's. Pictured are bridges spanning the Erie Canal from present day Canal and State Streets. Canal boats are shown navigating the canal. To the far left of the picture, a covered bridge spans the Mohawk River connecting Fort Plain to Nelliston, NY.	Slide
Manuscript leaf from a Koran from Persia; written in Arabic (Kufic?); 14 lines per page with sentence	Manuscript

<p>rosettes (?) in gold with red centers and five small blue dots around the outside; black writing; text area framed by ruled border in gold, green red and blue; marginal geometric design in blue gold, red and yellow with floral motif. Text from Koran, chapter 7, vss. 2-23, "The Battlements."</p>	
<p>Linen (cotton) material with two grommets at one end and fringe lining the other end of the flag. The front of the flag has a blue circle with a star on the top right side with dates 1837 - 1937 in blue on the top center. The middle center of the flag has the writing Col. E.E. Ellsworth, Centennial and Mechanicville, NY in blue. A thick red stripe with two thin red stripes on either side is above the word Centennial. A thick blue stripe with two thin blue stripes on either side is below the word Centennial. Below the phrase Mechanicville, NY and to the left in red is May 20-21-22.</p>	Linen Flag
<p>Edited photo showing Albert Einstein and Charles Steinmetz standing together. The photograph was originally taken on 23 April 1921 during a demonstration of the Radio Corporation of America's (RCA's) experimental trans-oceanic communication station at New Brunswick, NJ to a group of distinguished scientists. The photograph originally included a group of 19 scientists. The scientists were all removed except for Einstein and Steinmetz for this image. The fencing behind Einstein was recreated by a photographer. Steinmetz died in 1923, so this photograph was created after his death.</p>	Photograph
<p>John Doe describes his time working as a librarian during the Great Depression.</p>	Oral history

3. Creator

NY Heritage Label:	Creator
Maps to Dublin Core:	Creator
Definition:	An entity primarily responsible for making the content of the original item.
Comment:	Examples of Creator include a person, an organization, or a service; an author, artist, photographer, composer, etc.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary:	LCNAF: http://id.loc.gov/authorities/names.html ULAN: http://www.getty.edu/research/tools/vocabularies/ VIAF: https://viaf.org/

- If creator(s) is/are known, list here. If creator(s) is/are unknown, an institution may decide to leave the field blank.
- Enter personal names in inverted form: Last Name, First Name, Middle Name or initial (include birth and death dates if known). Do not use honorifics, titles, or nicknames unless it is necessary to disambiguate (e.g., the first name of the person is unknown).
- Separate multiple creators with a semicolon and one space. *For example*,
Smith, John, 1901-1968; Meyers, Rudolf, 1916-
- Enter corporate names in full direct form. In the case of hierarchy, list the organizational components from the largest to the smallest, separated by periods. *For example*,
United States. Army. Infantry Division, 27th
- Consult the Library of Congress Authority File ([LCNAF](#)), part of the Library of Congress Authorities web site, for correct form of personal, government agencies, and corporate names.
- If there is no entry in the LCNAF, consult the Virtual International Authority File ([VIAF](#)) or the Union List of Artist Names ([ULAN](#)) for correct form of artists' names.
- Alternate forms of names (such as "Buddy" Jones; Reverend Murrell; Dr. Reed) may be used in the [Description](#) field but not as the authoritative version.
- If the creator and the publisher of the original item are the same, repeat the creator's name in the [Publisher of Original](#) field.
- If the relationship to the item created is not obvious, or the circumstances of creation need to be more fully specified, use a relator term. Relator terms can be found on the MARC Code List for Relators, available at:
<https://www.loc.gov/marc/relators/relaterm.html>.
- When documenting an Oral History, the subject of the interview (i.e. the person being interviewed) is considered to be the Creator. Use the relator term "Narrator" to refer to

the person being interviewed. The person giving the interview is added to the [Contributor](#) field with the relator term `Interviewer`.

Example:	Comment:
Ellsworth, Elmer E., Colonel, 1837-1861	Full form of name known
McGinn, Donald J.	Dates not known
Long, Fred	Middle name and dates not known
Sister Mary Anne	Title added because surname not known
Jones, Mary Anne, CSJ	Surname and religious order known
Smith, John, 1901-1968; Meyers, Rudolf, 1916-	Multiple known creators
Rensselaer County Agricultural Society	Organization
United States. Army. Infantry Division, 27th	Organization with hierarchy
Carter, Margaret, 1921- (Narrator)	Subject of an oral history interview with appropriate relator term.

4. Subject

NY Heritage Label:	Subject
Maps to Dublin Core:	Subject
Definition:	A topic of the content of the item.
Comment:	Typically, Subject will be expressed as keywords, key phrases or classification codes that describe what the item is about.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary: (toggled on)	AAT: http://www.getty.edu/research/tools/vocabularies/ LCNAF: http://id.loc.gov/authorities/names.html LCSH: http://id.loc.gov/authorities/subjects.html MeSH: http://www.nlm.nih.gov/mesh/ TGM: http://www.loc.gov/pictures/collection/tgm/ VIAF: https://viaf.org/

- Select subject terms from a controlled vocabulary. Controlled vocabularies ensure consistency and can improve the quality of search results. For more information on controlled vocabularies, see page 6.
- Use subject terms that describe what an item is about.
- Separate terms within one field with a semicolon and one space.
- If there is a term that will aid users in finding the item that is not included in the vocabulary source, you may include it in the [Description](#) field or in the [Title](#) field.

Example:	Comment:
Advertisers; Advertising	LCSH Subjects
World War, 1939-1945	LCSH Subject
Librarians -- New York (State) -- Albany	LCSH Subject
Schools; Private schools; Boarding schools	TGM Subjects
Ball, Eliphalet	Personal Name Subject
United States. Army. Signal Company, 27th	Corporate Name Subject

5. Location

NY Heritage Label:	Location
Maps to Dublin Core:	Coverage-Spatial
Definition:	Geographic location as a subject of the work.
Comment:	Location depicted in a photograph, work of art, or as the subject of a document, manuscript, or book, NOT the area of the state that the item is held.
Mandatory for Upload:	No
Require for Best Practice:	No
Searchable:	Yes
Controlled Vocabulary:	TGN: http://www.getty.edu/research/tools/vocabularies/ LCSH: http://id.loc.gov/authorities/subjects.html

- This field should be used when an item specifically depicts or refers to a geographic location. If an item was created in a location but is not about the location, leave the field blank.
- If the location is unknown leave the field blank.
- Enter the village/town/city name, the county name, and then the state name for locations in the United States. Separate the village/town/city name from the county name with a space, a hyphen, and a space. Separate the county name from the state name with a space, a hyphen, and a space.
- Enter the village/town/city name followed by the country name for locations outside of the United States. Separate the village/town/city name from the country name with a space, a hyphen, and a space.
- Separate multiple locations with a semicolon and one space.
- Place names from a controlled vocabulary. Such as Thesaurus of Geographic Names ([TGN](http://www.getty.edu/research/tools/vocabularies/)) or the Library of Congress Subject Heading File ([LCSH](http://id.loc.gov/authorities/subjects.html)). The help page for LCSH is available at: <http://authorities.loc.gov/help/name-auth.htm>.

Example:	Comment:
Schenectady - Schenectady County - New York	Location as subject of a postcard
[Blank]	Portrait of a man from Albany, but there are no images in the portrait that are distinctive to Albany.
Fonda - Montgomery County - New York; Johnstown - Montgomery County - New York	Location as subject of a railroad passenger tariff.
Paris - France	Location as subject of a postcard
Hudson River - New York	Location as geo-physical feature within New York

6. Contributors

NY Heritage Label:	Contributors
Maps to Dublin Core:	Contributor
Definition:	An entity, other than the primary creator, responsible for making contributions to the content of the original item.
Comment:	Examples of Contributor include a person, an organization or a service such as editor, illustrator, translator or interviewer.
Mandatory for Upload:	No
Require for Best Practice:	No
Searchable:	Yes
Controlled Vocabulary:	LCNAF: http://id.loc.gov/authorities/names.html ULAN: http://www.getty.edu/research/tools/vocabularies/ VIAF: https://viaf.org/

- May use if known, otherwise, leave blank.
- A contributor is any person(s) or organization(s) that made a significant contribution to the intellectual content of the original resource, but whose contribution is secondary to that of the creator.
- Use a relator term to clarify the contributor's relationship to the work. Relator terms can be found on the MARC Code List for Relators, available at: <https://www.loc.gov/marc/relators/relaterm.html>.
- Separate multiple contributors with a semicolon and one space.
- Consult the Library of Congress Authority File ([LCNAF](#)), part of the Library of Congress Authorities web site, for correct form of personal, government agencies, and corporate names.
- If there is no entry in the [LCNAF](#), consult the Virtual International Authority File ([VIAF](#)) or the Union List of Artist Names ([ULAN](#)) for correct form of artists' names.
- If there is no entry in the [LCNAF](#), [VIAF](#), or [ULAN](#), consult [AACR2](#), [DACS](#), or [RDA](#) guidelines.
- Enter personal names in inverted form: Last Name, First Name, Middle Name or initial (include birth and death dates if known). Do not use honorifics, titles, or nicknames unless it is necessary to disambiguate (e.g., the first name of the person is unknown).
- Alternate forms of names (such as "Buddy" Jones; Reverend Murrell; Dr. Reed) may be used in the [Description](#) field but not as the authoritative version.
- Enter corporate names in full direct form. In the case of hierarchy, list the organizational components from the largest to the smallest, separated by periods.

Example:	Comment:
Bonaventure, Saint, Cardinal, 1217-1274 (Writer)	Writer
Lacy, Bob (Graphic Designer)	Graphic Designer
Lewis, Schell (Draftsman)	Draftsman
Child, William (Printer)	Printer
Smith, John (Interviewer)	Interviewer on an oral history
Santiago, Victor (Translator)	Translator

7. Publisher of Original

NY Heritage Label:	Publisher of Original
Maps to Dublin Core:	Publisher
Definition:	An entity responsible for making the original item available.
Comment:	Examples of a Publisher include a person, an organization, or a service.
Mandatory for Upload:	No
Require for Best Practice:	No
Searchable:	Yes
Controlled Vocabulary:	LCNAF: http://authorities.loc.gov/

- If the original item was published and the publisher is known, list here.
- If the publisher is unknown leave the field blank.
- If the publisher of the original item and the creator are the same, repeat the name in the [Creator](#) field.
- Consult the Library of Congress Name Authority File ([LCNAF](#)) for the correct form of the publisher's name.
The help page is available at: <http://authorities.loc.gov/help/name-auth.htm>.
- If there is no entry in the [LCNAF](#), enter the publisher's name as printed on the item.

Example:	Comment:
The American Press	Publisher of original broadside
C. W. Hughes & Co., Inc.	Publisher of original postcard
Capital District Library Council	Publisher of original newsletter
Guilderland Historical Society	Publisher of original booklet
Hart Free Library History Club	Producer of original interview

8. Date of Original

NY Heritage Label:	Date of Original
Maps to Dublin Core:	None
Definition:	The creation date of the original item.
Comment:	Typically, Date of Original will be associated with the creation or availability of the original item.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary:	None – recommended to use format defined by ISO 8601 W3CDT (http://www.w3.org/TR/NOTE-datetime)

- Add date of original according to the examples below if the actual date is known or an approximate date range can be authoritatively obtained.
- If there is a date range or approximate date range or the date range is guessed at, then a description of the evidence for the date range can be noted in the [Description](#) field.
- If the date is not known or if a general idea of the original date cannot be guessed at, then enter unknown. This will help collection owners find undated photographs later.
- Recommended best practice for encoding the date value is defined in a profile of [ISO 8601 W3CDT](#) and includes (among others) date of the form YYYY-MM-DD.

Example:	Comment:
1917-09-15	Exact date known: September 15, 1917
1900-05	Month and year known: May, 1900
1921	Year known
1934?	Approximate or circa date
1907-1915	Date range Description Field – “Design of divided back without border suggests the date range.”
1870?-1875?	Approximate date range
unknown	Date unknown

9. Hidden Date

NY Heritage Label:	Hidden Date
Maps to Dublin Core:	Date
Definition:	The creation date of the original item in ISO-8601 format.
Comment:	Typically, Hidden Date will be associated with the creation or availability of the original item.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary:	None – format defined by ISO 8601 W3CDT (http://www.w3.org/TR/NOTE-datetime)

- Add date of original according to the examples below if the actual date is known or an approximate date start can be authoritatively obtained.
- If there is a date range or approximate date range or the date range is guessed at, then a description of the evidence for the date range should be noted in the [Description](#) field.
- If the date is unknown, leave this field blank.
- Recommended best practice for encoding the date value is defined in a profile of [ISO 8601 W3CDT](#) and includes (among others) date of the form YYYY-MM-DD.
- Indication of a date ranges, approximate dates and unknown dates can be entered in the Date of Original metadata field as text.

Example:	Comment:
1917-09-15	Exact date known: September 15, 1917
1900-05	Month and year known: May, 1900
1921	Year known
1934; 1935; 1936; 1937; 1938; 1939	Date range from 1934-1939. Input the range as 1934-1939 and the Project Client will automatically format the date range this way. In the Description field: Design of divided back without border suggests this as the earliest year of the date range for this item. More information about the date can be added in the Notes metadata field.

10. Physical Format

NY Heritage Label:	Physical Format
Maps to Dublin Core:	Format
Definition:	Physical Format terms further specify and define the broader terms selected in Type .
Comment:	See Appendix B for definitions of the Physical Format terms.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary: (toggled on)	A New York Heritage Controlled Vocabulary List

- A controlled vocabulary list is provided for Physical Format metadata field in a drop down list.
- Use only one element in this field.
- First, use [Type](#) instructions to select the [DCMI Type](#) for your item. For example, the DCMI Type is recorded as Image, but the [Physical Format](#) may be as specific as Maps.
- Next, use [Appendix B](#) to find the [Physical Format](#) associated with the [Type](#) selected.
- Do *not* add new terms to this controlled vocabulary list.

Example:	Type:	Physical Format:
Amish willow rocking chair http://nyheritage.nnyln.org/u/?crandall,38	Physical Object	Furniture
1981 campus http://nyheritage.nnyln.org/u/?strose,1645	Image	Maps
Oral history interview with Anna Mae Gilleran http://nyheritage.nnyln.org/u/?strose,1552	Sound	Oral histories

11. Physical Description

NY Heritage Label:	Physical Description
Maps to Dublin Core:	Source
Definition:	Describes the physical manifestation of the original item.
Comment:	Provides end user with a better understanding of the size and characteristics of the physical item.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	No
Controlled Vocabulary:	None

- Develop a spreadsheet or database to be used by the scanning technician to record information such as the Physical Description, [Identifier](#), and [Local Location](#) of digitized object at the time of digitization.
- Include the physical dimensions (in centimeters and inches), size, or length of the original resource (height x width, height x width x depth, number of pages, length of audio/video, file format, etc).
- It is recommended that dimensions be recorded as both inches and centimeters. There are several free conversion tools available on the web. For example: http://www.onlineconversion.com/length_common.htm.
- Terms from controlled vocabularies can be used to describe the original item, but are not required.
 - For example, terms from Thesaurus of Graphic Materials (<http://www.loc.gov/pictures/collection/tgm/>)
 - For example, terms from “Genre Terms for Cultural Heritage Materials” (American Memory - Library of Congress) (<http://memory.loc.gov/ammem/techdocs/genre.html>)
 - For example, terms from “Art and Architecture Thesaurus” (Getty Research Institute) (<http://www.getty.edu/research/tools/vocabularies/>)
 - For example, format types for born-digital files (items created and managed in digital form) can be found at <http://www.iana.org/assignments/media-types/>
- Terms describing the physical characteristics or aspects of the original item may also be included in the [Title](#) and/or [Description](#) field (diary, letter, photograph, medal, chair, hat, etc).
- This field generally refers to the whole object and need not be applied at the page level.

Example:	Comment:
photograph; albumen; b&w; 4 x 2 1/2 in. (10 x 6 cm.)	Photograph
postcard; color; 3 x 5 in. (7.7 x 12.7 cm.)	Postcard
unbound serial; 12 p.; 8.25 x 5.25 in. (21 x 13.5 cm.)	Bulletin
ink, pencil, paint and gilt on paper, mounted in circular wooden frame; 7 1/16 in. (17.9 cm.) in diameter	Framed calligraphic souvenir
metal/grosgrain ribbon; 1.5 x 1.5 in. (4 x 4 cm.)	French Croix de Guerre (World War I Medal)
sound cassette; 20 min.	Cassette tape
bound text; 45 p.; parchment; 6 1/4 x 3 3/4 in. (16 x 9 3/4 cm.)	Diary
original sound recording; 40 min.	Oral history
original digital photograph; JPEG; 3.66 MB (3072x2304 pixels)	Born-digital photograph (NOTE: put type of camera used in Technical Data metadata field)

12. Local Location

NY Heritage Label:	Local Location
Maps to Dublin Core:	None
Definition:	A reference to a resource from which the uploaded item is derived.
Comment:	The uploaded item may be derived from the Local Location resource in whole or in part.
Mandatory for Upload:	No
Require for Best Practice:	No
Searchable:	No
Controlled Vocabulary:	None

- May use if appropriate, otherwise leave blank.
- Textual information about the Local Location resource may be included.
- Information such as the name of the collection from which the original item is derived or any other information that will aid in locating the physical item in the holding institution (cell number, accession number, box and folder numbers, etc.) may also be noted.
- Field may be hidden if organization would like to include location information but does not want this to be made public for security reasons. Please note that if the field is hidden, this will hold true across all items and collections owned by your institution. The default for this field is public if populated, so please discuss hiding the field with your local council administrator.

Example:	Comment:
The College of Saint Rose - Archives and Special Collections - Photograph Collection	The described resource is one item from this collection.
Howard I. Becker Collection	The described resource is one item from this collection.
Ellsworth Collection, drawer 1.2	The described resource is one item from this collection.
Saltsman Collection, Box 1	The described resource is one item from this collection.

13. Relation

NY Heritage Label:	Relation
Maps to Dublin Core:	Relation
Definition:	A reference to a related resource.
Comment:	Recommended best practice is to reference the resource by means of a string or number conforming to a formal identification system for example a reference url.
Mandatory for upload:	No
Require for Best Practice:	No
Searchable:	No. If you enter a URL beginning with “http://” it will be “clickable.”
Controlled vocabulary:	None

- This is an optional field that shows a relationship between a New York Heritage Digital Collections item and another item, collection, or resource related to the original item. This field is not part of the standard metadata template. Please contact your local council administrator if you wish to use this field.
- Relations may be expressed reciprocally, or in one direction only.
- The related item, collection, or resource can be hosted in New York Heritage, or elsewhere.
- If you are expressing a relationship between items hosted in New York Heritage, use the “reference URL” provided by CONTENTdm.

Example:	Comment:
A History of US Public Libraries; https://dp.la/exhibitions/exhibits/show/history-us-public-libraries	IsPartOf: An item that is part of an online exhibition.
Einstein and Steinmetz with group; http://cdm16694.contentdm.oclc.org/cdm/ref/collection/schmuse/id/15	IsVersionOf: The described resource is version of another photograph in the collection. The reference url to the other resource can be included too.
Will Graves and his father sawing wood; http://cdm16694.contentdm.oclc.org/cdm/ref/collection/p15085col16/id/46	Reference: The described resource is a letter that references a photograph (digital version of photograph is also part of the collection). This URL provides access to the digitized photograph from the metadata record describing the letter.

<p>Finding Aid: The Telfer Family Papers;http://empireadc.org/noneoc/id/noneoc0004</p>	<p>IsReferencedBy: The item is referenced in a Finding Aid describing the entire collection.</p>
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14. Type

NY Heritage Label:	Type
Maps to Dublin Core:	Type
Definition:	The nature or genre of the content of the original item.
Comment:	Type includes terms describing general categories, functions, genres, or aggregation levels for content. To describe the digital manifestation of the item, use the Format of Digital metadata field.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary: (toggled on)	DCMI http://dublincore.org/documents/dcmi-type-vocabulary/

- If help is needed in selecting Type please consult [Appendix A](#).
- A definition of each [Physical Format](#) term can be found in [Appendix B](#), too.
- More than one term may be assigned to an item, when appropriate. Separate each term with a semicolon and one space.
 - **For example**, if you are describing a resource that includes both text and illustrations, enter: `Text; Still Image`.

If you are describing a video that includes audio, you may enter: `Moving Image; Sound`.

- Reserve the term `Physical Object` for describing three-dimensional objects/artifacts in your collection. `Physical Object` should not be used for photographs or postcards in your collection.

Type:	Comment:
Collection	An aggregation of resources. A collection is described as a group; its parts may also be separately described
Dataset	Lists, tables, and databases
Event	Exhibition, webcast, conference, workshop, open day, performance, battle, trial, wedding, tea party, conflagration
Image	Drawings, paintings, maps, musical notation
Interactive Resources	Forms on Web pages, applets, multimedia learning objects, chat services, virtual reality environments

Moving Image	Videos, movies
Physical Object	Museum artifacts and other 3-D objects
Service	Photocopying service, a banking service, an authentication service, interlibrary loans, a Z39.50, Web server
Software	C source file, MS-Windows .exe executable, Perl script
Sound	Audio, cassette, phonograph record, oral history
Still Image	Photographs, postcards
Text	Books, letters, diaries, manuscripts

15. Language

NY Heritage Label:	Language
Maps to Dublin Core:	Language
Definition:	The language of the intellectual content of the item.
Comment:	Identifies the language in which a text is written or the spoken language of an audio or video.
Mandatory for Upload:	No
Require for Best Practice:	No
Searchable:	Yes
Controlled Vocabulary: (toggled on)	ISO 639-2 http://www.loc.gov/standards/iso639-2/php/code_list.php

- May use if appropriate, otherwise leave blank.
- Assign a three-letter language code from [ISO 639-2](#).
- A resource may include multiple languages. If more than one is entered, separate each language code with a *semicolon and one space*.
- The full word identifying the language of an item may also be included in the [Description](#) field.

Example:	Comment:
lat	Latin
ita	Italian
spa	Spanish
eng; fre; ger	English, French, and German

16. Format of Digital

NY Heritage Label:	Format of Digital
Maps to Dublin Core:	None
Definition:	Digital format of the object
Comment:	The media type, followed by the file type.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary: (toggled on)	MIME: http://www.iana.org/assignments/media-types/

- Select a value from [MIME](#) type (Internet Media Type – [IMT](#)).
- Information entered in this field should reflect the file type of the file used in the upload, not necessarily the digital master or archival file.
 - Note: digitized objects should be created in adherence to industry best practices. A list of best practices may be found here: [http://www.webjunction.org/documents/webjunction/Best Practices and Planning for Digitization Projects.html](http://www.webjunction.org/documents/webjunction/Best_Practices_and_Planning_for_Digitization_Projects.html)
 - Information about the digital master or archival file can be recorded as [Technical Data](#).
 - Born digital files should be represented in the [Physical Format](#) field as Born digital with additional descriptive information in [Physical Description](#) and [Technical Data](#).

Example:	Comment:
image/jpeg	Visual file in JPEG format
image/jp2	Visual file in JP2000 format
image/gif	Visual file in GIF format
image/tiff	Visual file in TIFF format
video/mp4	Video file in MP4 format
audio/mp3	Sound file in MP3 format
application/pdf	File in PDF format
video/x-ms-wmv	Video file in WMV format

17. Identifier

NY Heritage Label:	Identifier
Maps to Dublin Core:	None
Definition:	Unique alphanumeric identifier for the item.
Comment:	Recommended best practice is to identify the item by means of a unique numeric or alphanumeric character string. This identifier appears on each metadata record for the item.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary:	None

- Every item must have a unique Identifier.
- Every metadata record for a compound object will have the same Identifier.
- An Identifier can be used to pull up every metadata record for a compound object in the CONTENTdm Admin website.
- The Identifier can be used to keep track of the digital items in NYH.
- The filename of a single item without its file extension can be used as the Identifier. However, for a compound object because all of its metadata records must have the same Identifier only one of the digital filenames will be used as the Identifier. Usually that would be the filename for the first digital file in the compound object.
- A call number can be used as the Identifier but there are some issues to consider before one does this – please ask your library council for help with this.
- Guidelines, recommended but not required, for creating an Identifier in CONTENTdm, are (same guidelines are used to create filenames) :
 - o Use less than 30 characters.
 - o Use only alpha-numeric characters (no spaces or special characters);
 - o Use leading zeros. If the identifier includes numbers, use zero as a placeholder.

For example, a collection of Erie Canal photographs with 200 items could be numbered: erie001, erie002... erie023... erie125... etc. (NOT erie1, erie2, ... erie23, etc.).

- These guidelines are recommended because CONTENTdm truncates terms with hyphens (-) and underscores (_).
- Local naming conventions are acceptable if unique (e.g. accession numbers).

- Also, guidelines on file naming conventions for digital collections can be found at: <http://ucblibraries.colorado.edu/systems/digitalinitiatives/docs/filenameguidelines.pdf>

Example:	Comment:
118588	GE Photograph Collection, The Steinmetz Digital Collection of Schenectady
VYD0015	Using Capital District Library Council's OCLC symbol to create a unique identifier
Bib001	Family Bible Records, Middleburgh Library
0001e11	Ellsworth Collection, Mechanicville District Public Library

18. Collection ID

NY Heritage Label:	Collection ID
Maps to Dublin Core:	Identifier
Definition:	The alphanumeric collection identifier is typically based on an OCLC symbol and the order in which the collection is added to NY Heritage.
Comment:	This field is important because it quickly separates all items from a “digital collection” from other digital items uploaded to an institution’s collection.
Mandatory for Upload:	Yes
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary: (toggled on)	Local list – the Collection ID will be assigned by the local library council.

- This field is hidden from the end user.
- Your library council provides the Collection ID.
- This field along with the [Digital Collection](#) metadata field can be used to subdivide your organization’s digital holdings into discrete “Digital Collections” (formerly referred to as “sub-collections.”) Your local council administrator may require a description of each Digital Collection prior to establishing the Collection ID in the local controlled vocabulary.

Example:	Comment:
VTP001	VTP is OCLC symbol for the Buffalo and Erie County Historical Society, 001 is the first collection added to NY Heritage.
VTP002	VTP is OCLC symbol for the Buffalo and Erie County Historical Society, 002 is the second collection added to NY Heritage.
VYD001	VYD is the OCLC symbol for the Capital District Library Council, 001 is the first digital collection added to NY Heritage.

19. Holding Institution

NY Heritage Label:	Holding Institution
Maps to Dublin Core:	None
Definition:	Institution where item is physically located or private donor name.
Comment:	Include name of the institution.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary: (toggled on)	Local list

- Institution names should be entered the exact same way in every record.
- Using a Controlled Vocabulary Local List will allow users to click the name of your institution in the metadata and search that name as a phrase, providing a link to other collection materials.

Example:	Comment:
New York State Military Museum	Organization
Crandall Public Library Center for Folklife, History & Cultural Programs	Organization
The College of Saint Rose. Archives and Special Collections	Organization and department
Private Collection	Item from a private collection, where the owner does not want their name included in the metadata.

20. Contact Information

NY Heritage Label:	Contact Information
Maps to Dublin Core:	None
Definition:	Contact information for the holding institution
Comment:	May include a mailing address, an email address, a phone number, and/or a URL to organization's website
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	No
Controlled Vocabulary:	None

- Avoid carriage returns, tabs, or HTML tags in most metadata fields.
- However, HTML line-break tags
 may be used in the **Contact Information** metadata field so that each unit of data appears on a separate line when displayed on the web.
- If
 tags are not used, data will appear as a continuous string.
- Do not use a semicolon after a URL, as it will be appended to the address when it becomes a hyperlink.

Example:	Comment:
Albany Institute of History & Art 125 Washington Ave., Albany, NY 12210 (518) 463-4478 library@albanyinstitute.org www.albanyinstitute.org	Contact information for Albany Institute of History & Art using tags Information will display as follows: Albany Institute of History & Art 125 Washington Ave., Albany, NY 12210 (518) 463-4478 library@albanyinstitute.org www.albanyinstitute.org
Albany Institute of History & Art, 125 Washington Ave., Albany, NY 12210; (518) 463-4478; library@albanyinstitute.org , www.albanyinstitute.org	Contact information for Albany Institute of History & Art with semicolon and space between different pieces of information. Information will display as follows – in a string: Albany Institute of History & Art, 125 Washington Ave., Albany, NY 12210; (518) 463-4478; library@albanyinstitute.org ; www.albanyinstitute.org

21. Publisher of Digital

NY Heritage Label:	Publisher of Digital
Maps to Dublin Core:	None
Definition:	An entity responsible for making the digital item available.
Comment:	Examples of Publisher of Digital include a person, an organization, or a service.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary:	None

- Use this field to record the name of the organization responsible for digitizing the item.
- In many cases this will be the same as the [Holding Institution](#). In this situation, the organization's name should be entered into both the Publisher of Digital and [Holding Institution](#) fields.
- If the organization responsible for uploading the item is different from the organization that houses the original item, then the organization that digitized the item gets recorded in the Publisher of Digital field and the organization that houses the original item gets recorded in the [Holding Institution](#) field.
- Add “digitized by” to the field if you would like to recognize an individual or department that worked on the project.

Example:	Comment:
Publisher of Digital: Schenectady County Community College Holding Institution: Schenectady County Community College	Holding Institution and Publisher of Digital are the same.
Publisher of Digital: Bethlehem Public Library Holding Institution: Bethlehem Historical Association	Holding institution and Publisher of Digital are different.
Publisher of Digital: Galway Public Library Holding Institution: Private Collection	Original items are held privately but digitized with permission by the Publisher of Digital (rare).
Publisher of Digital: Schenectady County Community College; Digitized by John Doe Holding Institution: Schenectady County Community College	Credit given to an individual for digitizing an item.

22. Date of Digital

NY Heritage Label:	Date of Digital
Maps to Dublin Core:	None
Definition:	The creation date of the digitized item.
Comment:	Typically, Date of Digital will be associated with the creation date of the master/archival image.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	No
Controlled Vocabulary:	None. Format defined by ISO 8601 W3CDT (http://www.w3.org/TR/NOTE-datetime)

- Recommended best practice for encoding the date value is defined in a profile of [ISO 8601 W3CDT](http://www.w3.org/TR/NOTE-datetime) and includes (among others) dates of the form YYYY-MM-DD.
- This field is hidden from the end user.
- When recording an oral history, this will be the date of digitization if the recording has been transferred from an analog source.

Example:	Comment:
2004-07-01	Exact date known: July 1, 2004
2000-04	Month and year known: April, 2000
2001	Year known

23. Digital Collection

NY Heritage Label:	Digital Collection
Maps to Dublin Core:	Relation-Is Part Of
Definition:	Name of the digital collection contributed to NY Heritage.
Comment:	May be different than the name of physical collection.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary: Local list	Local List

- This field along with the [Collection ID](#) metadata field can be used to subdivide your organization's digital holdings into discrete **Digital Collections**.
- Because this list is a controlled vocabulary local list, end users will be able to click on the name of the digital collection in the metadata below the image and search that phrase, resulting in all items in that digital collection.
- Your local council administrator may require a description of each **Digital Collection** from you before the title is added to the Local List. More information on creating descriptions for Digital Collections can be found in [Part II: Creating Contextual Metadata](#).

Example:	Comment:
Town of Clifton Park History Collection Images of America, Howard I. Becker Collection	Names of two digital collections contributed to New York Heritage by Clifton Park-Halfmoon Public Library.
Amy Jennings Family Collection Kathleen Oser Collection	Names of two digital collections contributed to New York Heritage by Utica College - Center for Historical Research, determined by provenance.
Jewish Buffalo Image Collection Love Canal Images	Names of two digital collections contributed to New York Heritage by the University at Buffalo, determined by provenance and topic.

24. Library Council

NY Heritage Label:	Library Council
Maps to Dublin Core:	None
Definition:	Library Council of which the contributing institution is a member.
Comment:	These Library Councils are members of the New York Heritage Digital Collections Project as well as the Empire State Library Network (ESLN).
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary: Local list	A New York Heritage Controlled Vocabulary List

- The Empire State Library Network is comprised of nine regional 3Rs Councils serving all types of libraries and library systems across New York State. Seven of the Councils are currently using the NY Heritage Metadata Dictionary and Best Practices.
- Refer to [Appendix D](#) for a full discussion of this controlled vocabulary.

Example:	Comment:
Capital District Library Council	Use the full name of the council

25. Notes

NY Heritage Label:	Notes
Maps to Dublin Core:	None
Definition:	Notes on the item, digitization process, or any important information not contained in the above fields.
Comment:	
Mandatory for Upload:	No
Require for Best Practice:	No
Searchable:	Yes
Controlled Vocabulary:	None

- Recommended for any item where background information would enhance the understanding of the item.

Example:	Comment:
The Onondaga County Planning Board built the marina and it opened to the public in 1937. Development of the seaplane base was a Work Projects Administration WPA project.	Eleanor Roosevelt on the seaplane dock, from the Liverpool Public Library Collection
This oral history was recorded by the Pleasantville Library History Club at the Sunset Nursing Home in Pleasantville, NY.	Oral history with Margaret Carter, depicting her career in the intelligence service.
Local authors and celebrities donated works to the library. Actor Monty Woolley presented the library with a copy of The Man Who Came to Dinner. Grandma Moses sent a copy of Grandma Moses, American Primitive: Forty Paintings... after attending the event.	Library Preview Party and Open House, from the Saratoga Springs Public Library Collection

26. Rights

Note: this field has undergone significant revision in Version 4 of the Metadata Dictionary and Best Practices Guide. Contributors are not required to update legacy metadata, but will be required to use the rights statements defined below in the future. Additional citation or “credit” information previously entered in this field should be reviewed for consistency with the Rights field and may be entered in the [Citation Information](#) field (below). Please discuss any questions with your local council administrator.

NY Heritage Label:	Rights
Maps to Dublin Core:	Rights
Definition:	Information about rights held in and over the item.
Comment:	Please go to http://rightsstatements.org/en/ for the full explanation of each of the Rights Statements below.
Mandatory for Upload:	Yes
Require for Best Practice:	Yes
Searchable:	No
Controlled Vocabulary:	Yes; use terms from RightsStatements.org: http://rightsstatements.org/page/1.0/?language=en

- This field is required for material to be added to the Digital Public Library of America (DPLA).
- Please note that neither New York Heritage Digital Collections nor DPLA use the following statements:
 - In Copyright - EU orphan works
 - No Copyright - Contractual Restrictions
 - No Copyright - Non Commercial Use Only
- Rights Statements must be entered exactly as written below. It is highly recommended that Rights Statements be copied and pasted into the Project Client or metadata spreadsheet.
- Do not use a semicolon after the URL, as it will be appended to the address when it becomes a hyperlink.

Rights Statement:	Comment:
In Copyright; http://rightsstatements.org/vocab/InC/1.0/	This item is in copyright and permission must be obtained from the rights-holder. Please contact the Publisher of Digital for more information.
In Copyright - Educational Use Permitted; http://rightsstatements.org/vocab/InC-EDU/1.0/	This item is in copyright but can be used for educational purposes. Please contact the Publisher of Digital for more information for any use not qualifying as educational use.

In Copyright - Non-Commercial Use Permitted; http://rightsstatements.org/vocab/InC-NC/1.0/	This item is in copyright but can be used for non-commercial use without obtaining permission first. Please contact Publisher of Digital for any commercial use.
In Copyright - Rights-Holder(s) Unlocatable or Unidentifiable; http://rightsstatements.org/vocab/InC-RUU/1.0/	This item is in copyright but, after reasonable investigation, the Holding Institution or Publisher of Digital has not been able to locate the copyright holder.
No Copyright - United States; http://rightsstatements.org/vocab/NoC-US/1.0/	This item is in the public domain and its use is not restricted.
Copyright Not Evaluated; http://rightsstatements.org/vocab/CNE/1.0/	This item's copyright status is unknown but it may be used under Fair Use guidelines. For all other use, due diligence must be done to contact potential rights holders.
Copyright Undetermined; http://rightsstatements.org/vocab/UND/1.0/	This item's copyright status is unknown. The Publisher of Digital is missing key facts essential to making an decision on its copyright status. Contact Publisher of Digital for more information.
No Known Copyright; http://rightsstatements.org/vocab/NKC/1.0/	This item may be in the public domain, and if so, its use is not restricted. The Publisher of Digital believe the item is no longer under copyright but due diligence must be done to contact potential rights holders.

27. Citation Information

NY Heritage Label:	Citation Information
Maps to Dublin Core:	None
Definition:	Instructions for how materials should be cited or credited.
Comment:	This field contains the URL directing users to a NY Heritage webpage describing how items should be cited by end users.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	No
Controlled Vocabulary:	None

- This field should contain the URL linking to the NY Heritage Citation page.
- Do not use a semicolon after the URL, as it will be appended to the address when it becomes a hyperlink. The URL must be the listed after any additional information, as shown in the example below.
- The citation guide will instruct users to credit the Holding Institution and/or Publisher of Digital. If you would like to specify another entity (institution, organization, or department, etc.) to be credited for these materials, you may specify that information before the Citation URL.

Example:	Comment:
<code>https://nyheritage.org/citation-information</code>	Users should cite the described item using associated metadata according to best practices found at the link provided.
Please credit: SUNY Binghamton Historical Collections; <code>https://nyheritage.org/citation-information</code>	Users may have additional “credit” information added that is not available in the associated metadata. This may be added here. Use sparingly.

28. Technical Data

NY Heritage Label:	Technical Data
Maps to Dublin Core:	None
Definition:	Information about the digitization of an item.
Comment:	Information about the hardware, software, and processes used to digitize an item is important for the long-term maintenance of a digital item.
Mandatory for Upload:	No
Require for Best Practice:	Yes
Searchable:	No
Controlled Vocabulary:	None

- Highly recommended, but leave blank if unknown.
- At the time of digitization, the scanning technician should use a spreadsheet or database to record this information.
- Include file format, capture hardware, capture software, bit-depth, resolution, color space, file size (in bytes), dimensions, compression, and CheckSum value.
- This field may also include information about any enhancements (color correction, contrast adjustment, etc.) made to the web/access image, although enhancements made to images should be extremely limited.
- Separate multiple technical data information with a semicolon and one space.

Example:	Comment:
JPEG made from archival TIFF - Epson Perfection V700 Photo scanner	Technical data stored in one field
JPEG from Archival TIFF - MicroTek 9800XL; Adobe Photoshop Elements 2.0; 400 dpi; 24 bit color; RGB; 33,005,540 bytes: 3600 x 2812 pixels; no compression	Technical data stored in one field.
Born-Digital Camera Model: Canon Powershot SD 800 IS. Archival TIFF made from primary JPEG.	Object used to create a Born Digital item and the file format.
Born-digital recording using a Crown PZZM 185 hemispherical boundary microphone, captured using Audacity software as an archival WAV file.	Describing the software and equipment used to create a Born Digital audio file.

<p>Archival TIFF Images: Format: 300dpi, 8-bit Adobe RGB (1998); Professional Photography by Hudson Microimaging; Scanner: Phase One - P45; Operator: Rich Rugenstein ; 18,479,096 bytes; 2933x2100 pixels</p>	<p>Vendor used to create archival TIFF.</p>
--	---

29. Transcript

NY Heritage Label:	Transcript
Maps to Dublin Core:	None
Definition:	Transcript of text, audio, or video item.
Comment:	Transcripts allow for full-text searching of text or voice items.
Mandatory for Upload:	No
Require for Best Practice:	No
Searchable:	Yes
Controlled Vocabulary:	None

- Highly recommended for any text documents, otherwise leave blank.
- Your local council has access to an Optical Character Recognition (OCR) software that can generate a transcript from scanned documents. Please contact your local council for help with this.
- Please remember that your items are images and the text cannot be searched without a transcript or subject terms used in the metadata.
- There are several options for including transcripts for single-page documents:
 - Type the transcript directly into the Transcript field.
 - Copy and paste the transcript from another application (MS Word, Notepad, etc.) into the Transcript field.
 - Click on Edit the Metadata Template in the Project Client to identify the “data type” for the Transcript field as “directory import.” You will be prompted to browse for the transcript file.
- If uploading a preexisting transcript file, the files should be saved as TEXT (*.txt) files. CONTENTdm does not support formatting of text files. CONTENTdm will prompt you to browse for your .txt files when you are importing multi-page documents if you select "Import transcript files from a directory" during the import process.
- The Smithsonian Institute provides tips on transcription which may be viewed here: <https://transcription.si.edu/tips>

30. Latitude

NY Heritage Label:	Latitude
Maps to Dublin Core:	Coverage-Spatial
Definition:	The specific latitude of the location depicted in the item, expressed in decimal degrees.
Comment:	Use Latitude and Longitude fields together.
Mandatory for Upload:	No
Require for Best Practice:	No
Searchable:	Yes
Controlled Vocabulary:	None

- Important: only use this field when you know the geographic coordinates with some accuracy.
- If the subject or focus of the image is on an identifiable natural feature (such as a waterfall, lake, mountain, etc.) or a built feature (such as a building or a bridge), use the coordinates that pertain to the image subject.
- If the image seeks to capture a particular scene, –scape (i.e. landscape, cityscape, waterscape, etc.), or point of view with no obvious subject, use the coordinates that pertain to the photographer’s perspective (i.e. the location from which the image was captured).
- The Latitude and [Longitude](#) fields are used together. If you put data in this field, you also need to put longitude data in the longitude field.
 - Do NOT use any degree symbols or N and S to indicate North and South. Instead, use a string of numbers carried out to 5 decimal places. North is positive. South is negative.
 - Do NOT use spaces in the field.

Example:	Comment:
12.3456	For a North coordinate
-12.3456	For a South coordinate

31. Longitude

NY Heritage Label:	Longitude
Maps to Dublin Core:	Coverage-Spatial
Definition:	The specific longitude of the location depicted in the item, expressed in decimal degrees.
Comment:	Use Latitude and Longitude fields together.
Mandatory for Upload:	No
Require for Best Practice:	No
Searchable:	Yes
Controlled Vocabulary:	None

- **Important:** only use this field when you know the geographic coordinates with some accuracy.
- If the subject or focus of the image is on an identifiable natural feature (such as a waterfall, lake, mountain, etc.) or a built feature (such as a building or a bridge), use the coordinates that pertain to the image subject.
- If the image seeks to capture a particular scene, –scape (i.e. landscape, cityscape, waterscape, etc.), or point of view with no obvious subject, use the coordinates that pertain to the photographer’s perspective (i.e. the location from which the image was captured).
- The [Latitude](#) and Longitude fields are used together. If you put data in this field, you also need to put longitude data in the longitude field.
- Do NOT use any degree symbols or E and W to indicate East and West. Instead, use a string of numbers carried out to 5 decimal places. East is positive. West is negative.
 - Do NOT use spaces in the field.

Example:	Comment:
87.62876	For an East coordinate
-87.62876	For a West coordinate

32. File Name

NY Heritage Label:	File Name
Maps to Dublin Core:	None
Definition:	Name of digital file, including extension.
Comment:	Can be automatically generated by CONTENTdm by using the Project Client metadata template.
Mandatory for Upload:	Yes
Require for Best Practice:	Yes
Searchable:	Yes
Controlled Vocabulary:	None

- A good file naming convention ensures consistency and uniqueness and should be established before scanning begins.
- All file names must be unique. The best solution is to use your OCLC symbol to create a unique alpha string of characters. Then add a numerical string of numbers that indicate each new and unique file you have created.
- It is recommended, but not required, that file names follow some basic guidelines, such as:
 - Limit names to less than 30 characters, followed by a three-character extension (such as .jpg or .txt)
 - Limit special characters to only an underscore (_) or a hyphen (-)
 - Do not allow blank spaces in the name
 - Use alphanumeric characters (suggestion: use your OCLC symbol)
 - Avoid upper case characters
 - Use leading zeros (SRR001.tif, SRR002.tif, ...SRR013.tif)
- The CONTENTdm Project Client reads files in ascending alphanumeric order. You must determine your file names accordingly so that page 1 is read first, page 2 is next and so forth.
- CONTENTdm can automatically generate the metadata for File Name. Click on Edit Metadata Template in the Project Client, then Metadata Template in the left column, then the Edit button next to “Project Template.” Select “File Name” from the drop-down choices for the File Name metadata field.

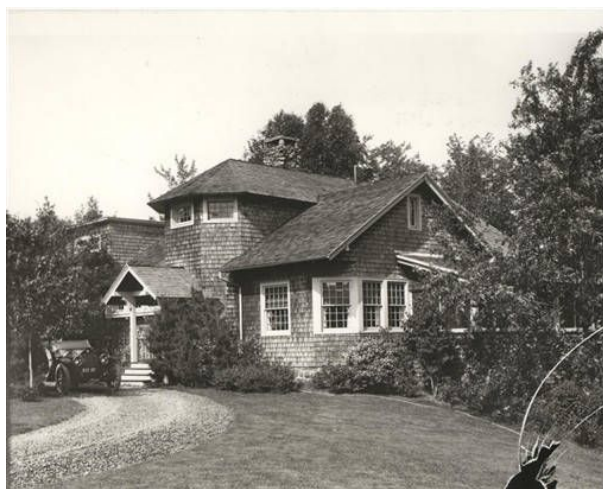
Part II: Creating Contextual Metadata

About Contextual Metadata

Contextual metadata provides additional information that helps users understand material beyond the description of an individual item. For instance, how the item fits into a larger collection, why the item was created in the first place, and the historical context in which the item and related items were created. New York Heritage's contextual metadata is similar to a traditional finding aid in that it helps the user place the material in a larger context.

For example, a picture of a building in a small town may have more meaning to the researcher if s/he knows that there are other pictures of nearby buildings, or a collection of pictures of the same building taken over time, or if that picture was part of a greater body of work of a particular architect or photographer, or an object of historical significance.

Consider the image to the right. Item-level metadata may be displayed as follows to the researcher, using the guidelines described in the previous section:³



Title*: Park Ave. #167 Westhoff House

Subject: Saranac Lake (N.Y.) - Building, structures, etc.; Sanatoriums - New York (State) - Saranac Lake - History - Design and construction.

Physical Format: Black-and-white photographs

Type: Still Image

Identifier: 85.113

Holding Institution: Saranac Free Library

Digital Collection*: Cure Colleges of Saranac Lake

Library Council*: Northern New York Library Network

Rights*: Copyright Not Evaluated; <http://rightsstatements.org/vocab/CNE/1.0/>

Required fields for upload*. See the [Metadata Field Element Chart](#) for more information

³ This is a real example from the collections, though the legacy metadata has been changed to represent the latest version of the metadata dictionary. Users will note that mandatory fields for upload (including Collection ID and File Name are not displayed to the researcher).

Elements of Institutional Metadata

This information supports the landing pages for contributing organizations and allows for geographic searching and reference access.

Institution Name

Definition: Main library or organizational body contributing to the digital collections. This should be the most recognizable form of the organization, not always the name of the library.

Obligation: Mandatory

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Contributing organizations page (list), institution landing page (header), Digital Collections page (list), collection landing pages

Example(s): Big State University [Note: *not*, Bigshot Donor College Library]

Hometown Public Library

Smith County Historical Society

Parent Organization

Definition: Parent organization of the library or institution, used to give context for organizational hierarchy.

Obligation: Optional

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Contributing organizations page (list), institution landing page (header), Digital Collections page (list), collection landing pages

Example: Metropolis Public Library System [Note: this element indicates that it is a parent of the [Institution Name](#)]

Department Name

Definition: Name of the department or division where the collections are held. The most recognizable form should, again, be in the [Institutional Name](#).

Obligation: Optional

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Institution landing page

Example: Department of Special Collections
 Local History Room

[Note: this element indicates that it is a child of the **Institution Name**]

Contact Person

Definition: Person at the contributing organization who is responsible for managing digital collections and/or answering inquiries about the collections.

Obligation: Recommended

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Institution landing page

Example: Judy Jones

Contact Phone

Definition: Phone number with extension for reaching the **Contact Person**.

Obligation: Recommended

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Institution landing page

Example: 555-222-1212 x506

Contact Email

Definition: Email address for reaching the **Contact Person**.

Obligation: Recommended

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Institution landing page

Example: jjones@bigstate.edu

Address1

Definition: Street address for contributing institution

Obligation:	Recommended
Source:	Provided by the contributing organization in consult with your local council administrator.
Display:	Institution landing page

Example:	12 North Road

Address2

Definition:	Second line of street address for contributing institution.
Obligation:	Optional
Source:	Provided by the contributing organization in consult with your local council administrator.
Display:	Institution landing page

Example:	Box 7117

City

Definition:	City where the contributing organization is located.
Obligation:	Recommended
Source:	Provided by the contributing organization in consult with your local council administrator.
Display:	Institution landing page

Example:	Smithville

State

Definition:	State where the contributing organization is located.
Obligation:	Recommended
Source:	Provided by the contributing organization in consult with your local council administrator.
Display:	Institution landing page

Example:	New York

Zip

Definition:	City where the contributing organization is located.
Obligation:	Recommended
Source:	Provided by the contributing organization in consult with your local council administrator.
Display:	Institution landing page

Example:	12234

County

Definition:	County where the contributing organization is located. This field is used to support county level browsing on the website.
Obligation:	Mandatory
Source:	Provided by the contributing organization in consult with your local council administrator.
Display:	Institution landing page

Example:	Onondaga Suffolk Erie

Phone

Definition:	Main phone number for contacting the contributing organization.
Obligation:	Recommended
Source:	Provided by the contributing organization in consult with your local council administrator.
Display:	Institution landing page

Example:	222.555.1234

Fax

Definition:	Fax number for contacting the contributing organization.
Obligation:	Optional

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Institution landing page

Example: 222.555.5678

Website

Definition: Website homepage URL for contributing organization. Recommended to use the most specific page relating to the department contributing digital collections.

Obligation: Recommended

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Institution landing page

Example: <https://bigstate.edu/speccoll>
<http://hometownlibrary.org>

About

Definition: Description of contributing organization. Can include a history of the organization, services offered, or any other relevant information. Should include relevant information about the department of the organization that contributes digital collections.

Obligation: Mandatory

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Institution landing page

Example: The Local History Room at Hometown Public Library holds a special collection of local history materials including the papers and photographs of several prominent families.

Hometown Public Library was founded by the community in 1897 and has operated continually since that time. It is one of the oldest public libraries in the region. In 2010, the community funded the building of a new library and a local history room and digitization lab were added to support the interests and needs of Hometown and its unique cultural heritage.

Proxy Member

Definition: For contributing organizations that are not direct members of an ESLN council. This will change the text on the Institution page to indicate that they uploaded their materials through an institution that is a member. This is normally a community partner that does not want or cannot afford Council membership. The proxy member element does not apply to ‘child organizations’ which should be indicated in the [Department Name](#) element. In the item level metadata, the [Publisher of Digital](#) may be the [Institution Name](#) and the [Holding Institution](#) may be the **Proxy Member**.

[Note: each Council has different policies on collections they host through their digital collections services. Please check with your local council administrator prior to hosting any proxy collections.]

Obligation: Optional

Source: Enter the Institution ID for the organization that is a member of the library council.

Display: Hidden (informs the display of “Collection Owner” on collection landing pages)

Example: CLRC001 [Hometown Historical Society submitted in partnership with the Hometown Public Library, found in the [Institution Name](#) element.]

Collection Level Elements

This information is used to form the landing pages for the digital collections and provide more collection-level context to the materials digitized by contributing organizations. By design, many of the elements for this collection-level metadata are harvested from item level descriptions. This makes it even more important to ensure that contributed metadata is well-formed at all levels.

Collection Title

Definition: The name of the digital collection used in the item level metadata. This information is submitted to your local council administrator early in the process of building your digital collection so that it may be added to the item-level Local List for the [Digital Collection](#) field.

Obligation: Mandatory

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Institution landing page (list), Digital Collections page (list), collection landing page (header)

Example: Crawford Collection

Abstract

Definition: A short description of the collection, no more than two sentences. This is used as expanded text on the browse page to give researchers a preview of materials contained in the collections.

Obligation: Mandatory

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Institution landing page (list), Digital Collections page (list)

Example: Swedish-American painter. Collection contains clippings, correspondence, printed material, subject files, photographs, drawings, manuscripts and articles.

Extent

Definition: The number of items included in the collection. This is a DACS (Describing Archives: a Content Standard) requirement and defined by the ISAD-G standard for archival description.

Obligation:	Mandatory
Source:	This information is harvested from the collection count in CONTENTdm. No action required from the contributor.
Display:	Collection landing page

Example:	120 items

Dates of Original

Definition:	Record the date range that best describes when the original items were created. Record as a range or single date. Inclusive ranges should be used, but bulk dates may be recorded.
Obligation:	Recommended
Source:	Take the information from any reliable source, including the internal evidence of the materials being digitized. This should be supplied to the local council administrator as part of the digitization process.
Display:	Collection landing page

Examples:	1785-1960 [sample inclusive date] 1785-1960, bulk 1916-1958 [sample bulk date] 1942-1998, predominant 1975-1991 [sample bulk date] c.1870-1879 [sample estimated date] undated

Time Periods

Definition:	Time periods represented by the collection, expressed as inclusive decades. This is used as a facet for browsing the collections.
Obligation:	Recommended
Source:	This information is harvested and transformed from data provided by the Hidden Date field in the item-level metadata. Contributor should ensure that the Hidden Date information is carefully and accurately recorded.
Display:	Digital Collections page (facets)

Example:	1900s, 1920s, 1930s

Creators

Definition: A list of primary creators for the digital collection. The collection displays the three most-named creators in this field.

Obligation: Recommended

Source: This information is harvested and transformed from data provided by the [Creator](#) field in the item-level metadata. Contributor should ensure that the **Creator** information is carefully and accurately recorded.

Display: Collection landing page

Example: Blackwell, Elizabeth, 1821-1910; Thompson, G.H;
Fenner, George W.

Subjects

Definition: A list of primary subjects for the digital collection. The collection displays the three most-named subjects in this field.

Obligation: Recommended

Source: This information is harvested and transformed from data provided by the [Subject](#) field in the item-level metadata. Contributor should ensure that the **Subject** information is carefully and accurately recorded.

Display: Collection landing page

Example: Grover (Fictitious character : Henson); Elmo
(Fictitious character : Henson)

New York Heritage Topic

Definition: New York Heritage Topics from [Appendix A](#) represented by the collection. This is used as a facet for browsing the collections at a high level. Use no more than three New York Heritage Topics to describe the collections. If there are additional topics, it may indicate that the collection needs to be more narrowly defined. *[Note: This element used to be used as an item-level field but has changed for this version of the guide.]*

Obligation: Recommended

Source: Take the information from any reliable source, including the internal evidence of the materials being digitized. This should be supplied to the local council administrator as part of the digitization process.

Display: Digital Collections page (facets), collection landing page

Example: Agriculture; Environment & Nature; Ethnic Groups

Locations

Definition: Defines the geographic location of the items defined in the collection. Up to 10 locations may be identified.

Obligation: Recommended

Source: This information is harvested and transformed from data provided by the [Location](#) field in the item-level metadata. Contributor should ensure that the **Location** information is carefully and accurately recorded.

Display: Collection landing page

Example: Syracuse (N.Y.); Utica (N.Y.)

Historical Context

Definition: Historical context for the collection, relating to its creators and the primary subjects of the collection. This should include a brief historical narrative that provides background information that will assist users in understanding the collection. This element is based on the Administrative/Biographical History element in [DACS](#).

Obligation: Recommended

Source: Take the information from any reliable source, including the internal evidence of the materials being digitized. For individuals, the **Historical Context** element may include parts, but not all, of the following information: names of individuals or families, important dates, places of residence, educational information, occupational or avocational activities, significant relationships.

When describing an organization, follow [DACS guidelines](#)⁴ for Administrative Histories of Corporate Bodies, giving information about the functions, activities, and relations with other corporate bodies. Include a brief summary of the most relevant aspects of the organization's existence, including the name, founding and ending dates, and geographic location.

In either case, deciding what information to include, think about how this information will enhance the researcher's understanding of the materials being described.

This should be supplied to the local council administrator as part of the digitization process.

4

http://www2.archivists.org/standards/DACS/part_1/chapter_2/7_administrative_biographical_history

Display: Collection landing page

Examples: Biographical History of Individuals or Families (from DACS):

Bessye J. Bearden was born in Atlantic City, New Jersey, in 1891, the youngest child of George and Carrie Banks. She attended local schools in North Carolina, Hartshorn Memorial College in Richmond, and Virginia Normal and Industrial Institute, from which she graduated. In later years Mrs. Bearden did graduate work at the University of Western Pennsylvania and Columbia University.

At the age of 20, Bessye Banks married R. Howard Bearden. They had one son, Romare, who became an internationally renowned artist.

Mrs. Bearden managed the New York office of the E. C. Brown Real Estate Company of Philadelphia for many years. She was also the New York representative for the *Chicago Defender*, starting in 1927, and did freelance writing for other publications. On June 11, 1935, Mrs. Bearden was appointed Deputy Collector of Internal Revenue, serving first in the Processing Division and later as an auditor. In 1922 she was the first black woman to be elected to local School Board No. 15 in New York City, where she served until 1939.

Mrs. Bearden was involved in numerous civic activities and belonged to several organizations, among them the New York Urban League, where she served as secretary of the executive board; the Council of Negro Women, where she served as treasurer; and the executive boards of the Harlem Community Council and the Colored Women's Democratic League, of which she was the first president.

Mrs. Bearden died in September 1943 at Harlem Hospital in New York City.

Administrative History of Corporate Bodies (from DACS)

The American Missionary Association was established in 1846 as an interdenominational missionary society devoted to abolitionist principles. From its beginning, the major support for the Association came from Congregationalists, but it also received support from Wesleyan

Methodists, Free Presbyterians, and Free Will Baptists. In 1865 it became the official agency of the Congregational churches for conducting educational work among the freedmen. Support from other denominations gradually declined until the Association became exclusively a Congregational organization.

Scope and Content

Definition: This element is based on the Scope and Content element in DACS and is generally presented in narrative form. Organizations writing a Scope and Content note for their digital collections for the first time may wait until the collection has been fully described before writing this note, or they may submit a more complete note after materials have been described.

From [DACS](#), *“This element provides information about the nature of the materials and activities reflected in the unit being described to enable users to judge its potential relevance.*

Obligation: Mandatory

Source: Take the information from any reliable source, including the internal evidence of the materials being digitized. From [DACS](#), *“the Scope and Content Element may include information about any or all of the following, as appropriate:*

- *The function(s), activity(ies), transaction(s), and process(es) that generated the materials being described*
- *The documentary form(s) or intellectual characteristics of the records being described (e.g., minutes, diaries, reports, watercolors, documentaries)*
- *The content dates, that is, the time period(s) covered by the intellectual content or subject of the unit being described*
- *Geographic area(s) and places to which the records pertain*
- *Subject matter to which the records pertain, such as topics, events, people, and organizations*
- *Any other information that assists the user in evaluating the relevance of the materials, such as completeness, changes in location, ownership and custody while still in the possession of the creator, and so on.”*

While such a note could become quite extensive, New York Heritage Digital Collections recommends that this information does not exceed three paragraphs and may be completed in one paragraph, if that is sufficient to the materials being described.

Display: Collection landing page

Example: **Sample Scope and Content Note:**

Digital collection includes 47 postcards and 17 letters sent from 1911 through 1920 from Genevieve Lewis in Ohio to her sister, Catherine Carlisle in New York State. Ms. Lewis's letters and postcards make up the bulk of the collection, with the postcards showing various vacations scenes from Ms. Lewis's travels, including a trip to San Francisco for the Panama Pacific International Exposition in 1915. Collection also includes a digitized copy of Ms. Carlisle's diaries depicting life in the town of Honeoye Falls, New York.

Publisher of Digital Collection

Definition: The organizations and people responsible for digitizing and creating metadata for the digital collection.

Obligation: Optional

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Collection landing page

Example: Mary Jones scanned the slides and created a draft for the index. Elizabeth Anderson identified locations and people depicted in the photographs. John Smith contributed to identification and local history details. Ellen Hunt created the descriptive metadata.

Scope and Content of Source Collection

Definition: This element would generally be used if the digitized materials represent a portion of a larger, archival collection and provides additional context as needed. Scope and Content for Source Collections should follow DACS.

Obligation: Optional

Source: Take the information from the processed collection of which the digitized collection is a part. If digitizing the entire archival collection, use [Scope and Content](#) (above).

Display: Collection landing page

Example: The physical collection comprises archival materials relating to the history of Central High School and the academic and extracurricular activities of its students. Items date from 1885 to 2004, along with numerous undated materials. There are six main categories of the collection: academic records, class year materials, special events, extracurricular activities, student societies, and school-related materials.

Finding Aid URL

Definition: Internet address of finding aid corresponding to the collection.

Obligation: Optional

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Collection landing page

Example: <http://bigstate.edu/archivalfindingaid>

Collection Type

Definition: The type of collection being described (usually depicting a collection that is all or mostly in a particular physical format). Currently used for Yearbooks in order to create custom, format-based landing pages.

Obligation: Optional

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Digital Collections page (facets), collection landing page

Example: Yearbooks

Yearbook Title

Definition: Title(s) of the yearbooks included in a single collection, separated by commas. Title should come from a single school. Multiple titles may occur, for example, where the name of the yearbook changes but the school remains the same. Used for the yearbooks landing page.

Obligation: Optional

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Yearbooks landing page

Example: The Ledger
The Criterion, Pirates

School Name

Definition: Name of the college school or district that published the yearbooks. Used for the yearbooks landing page.

Obligation: Optional

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Yearbooks landing page

Example: Whitesboro Central School District

School City

Definition: City or municipality where the college, school, or district that published the yearbooks is located. Used for the yearbooks landing page.

Obligation: Optional

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Yearbooks landing page

Example: Whitesboro, NY

Author of Metadata

Definition: Person or persons responsible for creating the collections-level metadata.

Obligation: Optional

Source: Provided by the contributing organization in consult with your local council administrator.

Display: Collection landing page

Example: Jane Smith, John Carrollton

Part III. Appendices

Appendix A: Type and Physical Format

Type	Physical Format
Image	Architectural drawings (visual works) Atlases Charts and graphs Drawings Ephemera (images) Maps Paintings Prints Woodcuts (visual works)
Moving Image	Born digital Home movies Independent films Newsreels Television programs
Sound	Born digital Broadcasts Music (audio) Oral histories Speeches (audio)
Still Image	Aerial photographs Albumen prints Black-and-white photographs Born digital Cabinet cards Cartes-de-visite (card photographs) Collodion prints Color photographs Contact prints Cyanotypes Daguerreotypes Gelatin silver prints Lantern slides Negatives (photographic) Panoramas Photocopies Photograph albums Photographs Postcards Posters Scrapbooks Sepia photographs Sketchbooks Slides (photographs) Stereographs Studio portraits (photographs)

	<p>Tintypes Yearbooks</p>
Physical Object	<p>Ammunition and weapons Art and decorative works Coins (money) Containers Costume Equipment and tools Flags Furniture Games and toys Transportation vehicles</p>
Text	<p>Advertisements Announcements and press releases Articles Books Born digital Broadsides Calendars Catalogs Certificates</p> <p>Correspondence Diaries Directories Ephemera (text) Financial documents Finding aids Genealogical tables Greeting cards Illuminated manuscripts Instructional materials Journals and magazines (periodicals) Law and legal documents</p> <p>Manuscripts Meeting minutes Memorandums Menus Music (text) Newsletters Newspapers Pamphlets Petitions Photocopies Report cards Reports Schedules (time plans)</p>

	Signs Speeches (text) Telegrams Transcripts
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Appendix B: Physical Format Glossary

First, use [Type](#) instructions to select the DCMI Type for your item.

Next, use [Appendix A](#) to find the [Physical Format](#) associated with the [Type](#) selected.

Then, use Appendix B to read the descriptions of each [Physical Format](#) to aid your selection of the most appropriate [Physical Format](#) for your item.

All of these terms are taken from the Getty Museum's Art & Architecture Thesaurus Online (<http://www.getty.edu/research/tools/vocabularies/aat/>).

Term	Type	Definition
Advertisements	Text	Public notices or paid announcements, especially those in print.
Aerial photographs	Still Image	Photographs of the earth taken from aircraft. Do not use for photographs of celestial bodies or astronomical phenomena.
Albumen prints	Still Image	Photographic prints having albumen as the binder; always black-and-white, though they may be toned to a monochrome hue.
Ammunition and weapons	Physical Object	Implements and mechanisms designed to be used as a means of physical attack or defense. Included are weapons such as swords, ground- or carriage-supported artillery, arrowheads, and objects propelled by firearms (e.g., cartridges). Examples include swords, American Long Rifles, and spears.
Announcements and press releases	Text	An official written communication issued to the news media or other targeted audiences for the purpose of letting the public know of a news item or upcoming event.
Architectural drawings (visual works)	Image	Drawings of architecture and architectural projects, whether the project was executed or not. The term may also refer to any image in a two-dimensional medium that serves this same purpose, including prints and computer images. Includes blueprints and blue-line drawings.
Art and decorative works	Physical Object	A piece of fine art such as paintings and decorative art, that is art that also has a function. Includes folk art, crafts.
Articles	Text	Written compositions prepared for publication as an independent portion of a magazine, newspaper, encyclopedia, or other work.
Atlases	Image	Volumes of maps, with or without descriptive text, which may be issued to supplement or accompany texts or be published independently.
Black-and-white photographs	Still Image	Refers to a broad class of photographs having images in gray tones, black, and white, and sometimes one hue (which can result from chemical processes used, including toning, or from aging).
Books	Text	Items comprising a collection of leaves of paper, parchment, wood, stiffened textile, ivory, metal tablets, or other flat material, that are blank, written on, or printed, and are strung or bound together in a volume.

Born digital	Moving Image; Sound; Still Image; Text	Describes material or content created in electronic form and saved as digital data, having had no initial or interstitial state as an analog or physical product. Usually used to refer to electronically produced drafts of text, correspondence or visual works such as photographs created with digital cameras. This material may be written or saved on personal computers, floppy disks, CDs, DVDs, hard drives, or any mode of digital storage media.
Broadcasts	Sound	Transmissions of signals, usually taking the form of programs made public by means of radio.
Broadsides	Text	Sizeable single-sheet notices or advertisements printed on one or both sides, often chiefly textual rather than pictorial, and printed to be read unfolded.
Cabinet cards	Still Image	Mounted on cards and a larger alternative to the Cartes-de-visite. The larger size (approximately 6 ½ x 4 ¼ inches) was considered more appropriate for display, allowed for group portraits, and permitted the image to be retouched. Popular until World War I.
Calendars	Text	Registers of days or other contrivances for reckoning days, months, years, etc., such as a table showing the division of a given year into its months, weeks, days, years, or other divisions of time.
Catalogs	Text	Enumerations of items, such as a file of bibliographic records or a list of art objects, usually arranged systematically and with descriptive details; may be in book or pamphlet form, or on cards
Certificates	Text	Documents giving authoritative recognition of a fact, qualification, or promise.
Charts and graphs	Image	A diagram or table intended to communicate information visually.
Coins (money)	Physical Object	Pieces of metal stamped by government authority for use as money.
Collodion prints	Still Image	Photographic prints having collodion as the binder.
Color photographs	Still Image	The broad class of photographs having images composed of more than one hue, plus the neutral tones. For photographs having a range of tones within one hue, see Black-and-white photographs.
Contact prints	Still Image	Photographic prints made by interfacing a negative and a sheet of photographic paper and exposing the paper with raw light. Includes contact sheets.

Containers	Physical Object	Artifacts used to hold substances or objects. Included are descriptors for containers intended for culinary use, for horticultural use, for health care, hygiene, and similar personal needs as well as descriptors for containers associated with liturgical, funerary, and other ceremonial activities. Examples include baskets, buckets, and tea tins.
Correspondence	Text	Written communication that is somewhat more formal than memoranda or notes, usually on paper and delivered. Use for email communications too.
Costume	Physical Object	Includes garments considered items of dress (e.g., shirts, trousers, undershirts, parkas). Also includes protective wear, including types of armor; vestments and other ceremonial garments; uniforms; and other accessories, including those worn on the body (e.g., bonnets, moccasins) and those carried on the person (e.g., evening bags, parasols). Examples include trousers, parasols, and uniforms.
Cyanotypes	Still Image	Blue-toned photographic prints produced by the blueprint process. These do NOT include reproductive prints of architectural or other technical drawings; for these, use Architectural drawings.
Daguerreotypes	Still Image	Daguerreotypes produce a direct positive image on a silver-coated copper plate, often mounted in special cases lined with colored velvet or leather. Daguerreotypes are not to be confused with Tintypes which use a thin sheet of lacquered iron as the image support.
Diaries	Text	Refers to books containing the daily, personal accounts of the writer's own experiences, attitudes, and observations. Use Financial documents when referring to an individual's or an organization's account of occurrences or transactions.
Directories	Text	A book containing an alphabetical or classified listing of names, addresses, and other data of specific persons, groups, or firms.
Drawings	Image	Art produced by drawing, which is the application of lines on a surface, often paper, by using a pencil, pen, chalk, or some other tracing instrument to focus on the delineation of form rather than the application of color.
Ephemera (images)	Image	Materials, usually printed, created for a specific, limited purpose. Examples include trade cards, bookmarks, posters, airsickness bags, prospectuses, stock certificates, and programs.
Ephemera (text)	Text	Materials, usually printed, created for a specific, limited purpose. Examples include bulletins, directions, applications, invitations, tickets, programs, notes, postal cards, and applications.
Equipment and tools		Machines, implements or other things needed for a particular job or activity. Examples include sewing machines, toasting forks, cradleboards, and hand mirrors.
Financial documents	Text	Documents on the financial activities of a business, an individual or any other entity. Examples include personal saving books, account

		ledgers, journal (accounts), balance sheets, loan, investment, and financial statements.
Finding aids	Text	Any tool that helps users gain better access to and understanding of a collection of records. Finding aids can be in a wide variety of formats, such as indexes, guides, inventories, shelf lists, and catalogs.
Flags	Physical Object	A piece of cloth, usually rectangular, of distinctive color and design, used as a symbol, standard, signal, or emblem.
Furniture	Physical Object	Furniture are primarily movable articles that provide comfort, convenience, or protection in dwellings, places or business, or other public or private spaces. They may be useful or ornamental and may be used in indoor or outdoor spaces. Examples include Windsor chair, sofa, and sewing table.
Games and toys	Physical Object	Equipment and accessories used in a large array of activities engaged in for personal satisfaction or amusement during leisure time, including playthings and other devices used as pastimes or during competitive play. Examples include croquet sets, hockey sticks, dolls, and board games.
Gelatin silver prints	Still Image	Refers to photographic prints having gelatin as the binder, holding silver as the final image material; always black-and-white, though they may be toned to a monochrome hue.
Genealogical tables	Text	Documents representing the lineage of a person or persons in tabular or diagrammatic form.
Greeting cards	Text	Cards often imprinted with messages and suitable illustrations, sent or given on special occasions or holidays.
Home movies	Moving Image	Motion pictures on film or videotape made by amateurs, or professionals in a nonprofessional capacity, intended for home viewing by family and friends. People, scenes and events filmed generally feature the filmmakers' immediate circle and personal activities.
Illuminated manuscripts	Text	An illuminated manuscript is a hand-written text supplemented by the addition of decoration, such as decorated initials, borders (marginalia) and miniature illustrations.
Independent films	Moving Image	Motion pictures created by independent filmmakers, without financial backing from a major studio and with generally a greater degree of artistic control in the hands of the filmmakers than is the case with studio films.
Instructional materials	Text	Print or non-print materials used for the purpose of imparting knowledge, attitudes, or skills to others.
Journals and magazines (periodicals)	Text	Periodicals containing articles, essays, poems, or other writings by different authors, usually on a variety of topics and intended for a general reading public or treating a particular area of interest for a popular audience.

Lantern slides	Still Image	Transparent positive image made or mounted on glass, usually (but not necessarily) photographic measuring 3.25 to 3.5 inches by 4 inches. Lantern slides are projected onto a screen by means of a specialized projector.
Law and legal documents	Text	Documents related to statutes, administrative regulations, and judicial precedents. Examples include affidavits, charters, testimony, employment forms, certificates, wills and trusts.
Manuscripts	Text	Unpublished documents.
Maps	Image	Refers to graphic or photogrammetric representations of the Earth's surface or a part of it, including physical features and political boundaries, where each point corresponds to a geographical or celestial position according to a definite scale or projection. The term may also refer to similar depictions of other planets, suns, other heavenly bodies, or areas of the heavens. Examples include contour maps, engineering maps, fire insurance maps, forestry maps, plats (maps), relief maps, topographic maps, tourist maps, transportation maps, and zoning maps.
Meeting minutes	Text	The written record of an official proceeding.
Memorandums	Text	Documents recording information used primarily for business communication. Lacks the salutation and formal ending of a letter.
Menus	Text	A list of dishes served at a meal or that can be ordered in a restaurant.
Music (audio)	Sound	Recordings in any format of music, including songs, operas, and musicals.
Music (text)	Text	Music written in notation so it can be read and played. Examples include hymnals, librettos, scores, songbooks, and sheet music.
Negatives (photographic)	Still Image	Photographs, usually on a transparent support, in which the tones or colors are reversed from their appearance in nature. Includes glass plate negatives.
Newsletters	Text	Letters, reports, or other brief written communications that communicate news, particularly those written by societies or business organizations. Historically referred to serial publications consisting of one or a few printed sheets containing news and information of interest to the general public or to a special group.
Newspapers	Text	Serials published at stated, frequent intervals, such as daily or weekly, and containing news, editorials, features, advertisements, and other items of current interest.
Newsreels	Moving Image	Nonfiction motion pictures originally released to theaters in periodic issues, each issue consisting of a number of news stories reporting or commenting on recent events.
Oral histories	Sound	Works that record interviews conducted to preserve the recollections of persons whose experience or memories are representative or are of special historical or social significance.

Paintings	Image	Unique works in which images are formed primarily by the direct application of pigments onto a generally two-dimensional surface.
Pamphlets	Text	Independent publications consisting of a few leaves of printed matter folded or fastened together but not bound, often with no cover or a paper cover. Examples include booklets and leaflets
Panoramas	Still Image	A pictorial representation with a very broad horizontal ranges of view. The term is also used specifically for photographs that show a wide view produced by a panoramic camera or by joining photographs together.
Petitions	Text	Includes any written requests and lists of signatures submitted to an authority to appeal for the performance of specific action.
Photograph albums	Still Image	A collection of photographs, generally in a book.
Photocopies	Still image; Text	General term for copies produced by photocopying, that is, in a machine employing a light-sensitive process, and usually at a one-to-one scale.
Photographs	Still Image	An image rendered using a camera. This term should only be used when the photographic format is unknown or unidentifiable.
Postcards	Still Image	Cards on which a message may be written or printed for mailing without an envelope, usually at a lower rate than that for letters in envelopes. One side of the card frequently features a photographic image, advertisement or graphic illustration.
Posters	Still Image	Notices, usually decorative or pictorial, intended to be posted to advertise, promote, or publicize an activity, cause, product, or service; also, decorative, mass-produced prints intended for hanging.
Prints	Image	Pictorial works produced by transferring images by means of a matrix such as a plate, block, or screen, using any of various printing processes. Common types of prints include engravings, etchings and lithographs.
Report cards	Text	Statements of a student's academic record for a particular period, often including grades and an evaluation of the student's rate of progress.
Reports	Text	Official or formal records in the form of documents containing presentations of facts, proceedings, investigations, or events.
Schedules (time plans)	Text	Plans of procedure, showing the sequence of items or operations and the time allotted for each.
Scrapbooks	Still Image	Books or albums designed so that a variety of items may be affixed to the pages, including photographs, clippings, and other memorabilia.
Sepia photographs	Still Image	A photograph with a brown tint.

Signs	Text	A display (as a lettered board or a configuration of neon tubing) used to identify or advertise a place of business or a product or a posted notice bearing a designation, directions, or command. Examples include traffic signs, political signs, and notification signs.
Sketchbooks	Still Image	Books or pads of blank sheets used or intended for sketching, which are informal or rough drawings.
Slides (photographs)	Still Image	Positive transparencies in mounts suitable for projection, usually 35mm film in a mount of 2 by 2 inches. An image on film or glass, usually positive, intended to be viewed by means of light passing through the image and base using a viewer or projector.
Speeches (audio)	Sound	Sound recording in which someone is orating a public address or talk.
Speeches (text)	Text	Written transcripts. The text of any public address or talk.
Stereographs	Still Image	Refers to the most common form of stereoscopic photographs, which are double photographs of the same image taken from two slightly different perspectives. Stereographs are distinctive among other stereoscopic photographs because they are photographic prints mounted on cards.
Studio portraits (photographs)	Still Image	Portraits taken in a professional photographer's studio, often making use of backdrops or props.
Telegrams	Text	Messages sent by telegraph.
Television programs	Moving Image	Presentations of informational or entertainment shows such as news, sports, drama, comedy, music, documentary, talk or game shows to the public by means of television transmission.
Tintypes	Still Image	Photographs produced by the wet collodion process and then placed directly on thin sheets of lacquered metal, usually iron. Tintypes are not to be confused with Daguerreotypes, which utilize a copper plate for the image support.
Transcripts	Text	A printed record that is a verbatim account of something originally presented in another medium, like a radio broadcast or a handwritten letter.
Transportation vehicles	Physical Object	Vehicles designed to carry or convey merchandise, materials, or passengers across a distance, whether on land or water, or through water, air, or space. Examples include airplane, stagecoach, canoe, rocket, wagon, car, and truck.
Woodcuts (visual works)	Image	Prints made from designs cut in relief on wood.
Yearbooks	Still Image	An annual publication giving current information and listing events or aspects of the previous year, esp. in a particular field or a book containing photographs of the senior class in a school or college and details of school activities in the previous year.

Appendix C: Glossary

Useful Glossaries:

<http://www.cdlib.org/gateways/technology/glossary.html#m> (California Digital Library)

AACR2rev: Anglo-American Cataloging Rules are designed for use in the construction of catalogs and other lists in general libraries of all sizes. The rules cover the description of, and the provision of access points for, all library materials commonly collected at the present time.

AAT: Art & Architecture Thesaurus is a vocabulary describing the objects of art as well as the processes and materials from which the objects are made.

<http://www.getty.edu/research/tools/vocabularies/>

ASCII: American Standard Code for Information Interchange. It's a 7-bit character code where every single bit represents a unique character. W3C (The World Wide Web Consortium) which is the main international standards organization for the World Wide Web provided variants of an international character code standard, ASCII being the most common one.

Bibliographic: 1) the history, identification, or description of writings or publications; 2) a list often with descriptive or critical notes of writings relating to a particular subject, period, or author; 3) a list of works written by an author or printed by a publishing house ; or 4) the works or a list of the works referred to in a text or consulted by the author in its production.

Controlled Vocabulary: A controlled vocabulary is an established list of standardized terms that help end users find similar items.

DACS: Describing Archives: A Content Standard - is a set of rules for describing [archives](#), personal papers, and [manuscript](#) collections. The descriptive standard can be utilized for all types of archival material. In 2004, DACS was adopted by the [Society of American Archivists](#) (SAA) as an official SAA standard.

Dublin Core: The Dublin Core Metadata Element Set is a vocabulary of fifteen properties for use in resource description. The name "Dublin" is due to its origin at a 1995 invitational workshop in Dublin, Ohio; "core" because its elements are broad and generic, usable for describing a wide range of resources.

Dublin Core Metadata Initiative: Using only 15 field metadata elements, a Dublin Core metadata record can describe physical resources such as [books](#), digital materials such as [video](#), [sound](#), [image](#), or [text](#) files, and composite media like [Web pages](#). Metadata records based on Dublin Core are intended to be used for cross-domain information [resource](#) description. The NY Heritage field metadata elements are based on the Dublin Core Metadata Initiative (DCMI). For more information on the DCMI Field Element Set, visit: <http://www.dublincore.org/documents/dces/>.

DPLA: The Digital Public Library of America brings together the riches of America's libraries, archives, and museums, and makes them freely available to the world. It strives to contain the full breadth of human expression, from the written word, to works of art and culture, to records of America's heritage, to the efforts and data of science. DPLA aims to expand this crucial realm of openly available materials, and make those riches more easily

discovered and more widely usable and used, through its three main elements: portal, platform, and public option. For more information, see <http://dp.la/info/>

Dublin Core Metadata Initiative Type Vocabulary is a general, cross-domain list of approved terms that may be used as values to identify the genre of a resource. <http://dublincore.org/documents/dcmi-type-vocabulary/> DCMI- Vocabulary for Metadata Field Type: <http://dublincore.org/documents/dcmi-type-vocabulary/#H7>

ESDN: Empire State Digital Network serves as New York State's service hub for passing metadata to the Digital Public Library of America. <http://empirestate.digital/> For more information on service hubs visit: <https://dp.la/info/hubs/>

ESLN: Empire State Library Network comprises nine regional 3Rs Councils serving all types of libraries and library systems across New York State. Seven of the Councils are currently using the NY Heritage Metadata Dictionary and Best Practices. <https://www.esln.org/>

HTML: Hypertext Markup Language, a standardized system for tagging text files to achieve font, color, graphic, and hyperlink effects on World Wide Web (WWW).

IMT: Internet Media Type – see - MIME or http://en.wikipedia.org/wiki/Internet_media_type

ISO 639-2: Provides the International Standard for language codes. W3C (the World Wide Web Consortium) which is the main international standards organization for the World Wide Web provides two sets of language codes, one as a two-character code set (639-1) and another as a three-character code set (639-2) for the representation of names of languages. ISO 639-2 covers a larger number of individual languages (due to its less-restrictive scope) than the two-character code set (639-1). It also includes identifiers for collections of languages. http://www.loc.gov/standards/iso639-2/php/code_list.php

ISO 8601 W3CDT: Provides the International Standard for dates and times. W3C (The World Wide Web Consortium) which is the main international standards organization for the World Wide Web provides the standard format for dates and times. <http://www.w3.org/TR/NOTE-datetime>

LCNAF: Library of Congress Name Authority File is a thesaurus of authority records used by librarians to establish forms of names (for persons, places, meetings, and organizations), titles, and subjects used on bibliographic records. Authority records enable librarians to provide uniform access to materials in library catalogs and to provide clear identification of authors and subject headings. <http://authorities.loc.gov/>

LCSH: Library of Congress Subject Heading file is a thesaurus of subject headings, maintained by the United States [Library of Congress](http://www.loc.gov), for use in bibliographic records. LCSHs are an integral part of bibliographic control, which is the function by which libraries collect, organize and disseminate documents. LCSHs are applied to every item within a library's collection, and facilitate a user's access to items in the catalog that pertain to similar subject matter. <http://id.loc.gov/authorities/subjects.html>

MARC: [MAchine-Readable Cataloging](http://www.loc.gov/standards/marc) is a data format and set of related standards used by libraries for the representation and communication of bibliographic and related information about books and other material they collect.

MeSH: Medical Subject Headings is a controlled vocabulary produced by the National Library of Medicine and used for indexing, cataloging, and searching for biomedical and health-related information and documents. <http://www.nlm.nih.gov/mesh/>

Metadata: The word "metadata" means "data about data". Metadata articulates a context for objects of interest -- "resources" such as MP3 files, library books, or satellite images -- in the form of "resource descriptions" (Dublin Core Metadata Initiative - <http://dublincore.org/metadata-basics/> - Sept. 2011)

MIME: Multipurpose Internet Mail Extensions is a specification for formatting non-ASCII messages so that they can be sent over the Internet. Many email clients now support MIME, which enables them to send and receive graphics, audio, and video files via the Internet mail system. MIME is also referred to as Internet Media Type ([IMT](http://www.iana.org/assignments/media-types/index.html)). <http://www.iana.org/assignments/media-types/index.html>

OCLC: Online Computer Library Center, Inc. (OCLC) is "a nonprofit, membership, computer library service and research organization dedicated to the public purposes of furthering access to the world's information and reducing information costs". OCLC owns CONTENTdm software. <http://www.oclc.org/en-US/home.html>

RDA: Resource Description and Access is a standard for descriptive cataloging initially released in June 2010, providing instructions and guidelines on formulating bibliographic data. Intended for use by libraries and related cultural organizations such as museums and archives, RDA is the successor to Anglo-American Cataloguing Rules, Second Edition (AACR2), the prevailing standard for English language libraries since 1978.

TGM: Thesaurus for Graphic Materials a controlled vocabulary compiled by the Prints and Photographs Division, Library of Congress, of subject headings that may be used for indexing, cataloging, and searching for graphic materials. <http://www.loc.gov/pictures/collection/tgm/>

TGMII: Thesaurus for Graphic Materials is a controlled vocabulary compiled by the Prints and Photographs Division, Library of Congress, of genre and physical characteristic terms. <http://www.loc.gov/rr/print/tgm2/> As of October 2007, the Thesaurus for Graphic Materials I: Subject Terms (TGM I) and the Thesaurus for Graphic Materials II: Genre and Physical Characteristic Terms (TGM II) were merged into a single vocabulary, the Thesaurus for Graphic Materials. <http://www.loc.gov/pictures/collection/tgm/>

TGN: Thesaurus of Geographic Names a structured vocabulary focusing on places important for the study of art and architecture. <http://www.getty.edu/research/tools/vocabularies/>

ULAN: Union List of Artist Names a structured vocabulary containing names plus biographical and bibliographic information about artists and architects. <http://www.getty.edu/research/tools/vocabularies/>

Appendix D: County List by Council

Controlled Vocabulary Term [Full Name]	Council Acronym	Counties Served
Capital District Library Council	CDLC	Albany, Fulton, Hamilton, Montgomery, Rensselaer, Saratoga, Schenectady, Schoharie, Warren, and Washington
Central New York Library Resources Council	CLRC	Herkimer, Madison, Oneida, and Onondaga.
Long Island Library Resources Council	LILRC	Nassau and Suffolk
Northern New York Library Network	NNYLN	Clinton, Essex, Franklin, Jefferson, Lewis, Oswego, and St. Lawrence
Rochester Regional Library Council	RRLC	Livingston, Monroe, Ontario, Wayne, and Wyoming
South Central Regional Library Council	SCRLC	Allegany, Broome, Cayuga, Chemung, Chenango, Cortland, Delaware, Otsego, Schuyler, Seneca, Steuben, Tioga, Tompkins, and Yates
Western New York Library Resources Council	WNYLRC	Erie, Niagara, Chautauqua, Cattaraugus, Orleans & Genesee counties

Appendix E: NY Heritage Topic

NY Heritage Topic	Application	Examples
Agriculture	Items pertaining to farming and agricultural activities, facilities, tools, equipment, and farm workers	Farms/farming/homesteading Crops/fields Threshing/Harvesting Farm letters, diaries, ledgers, or photographs Advertisements for equipment, seed, or fertilizer Photographs of farmers and livestock at fairs
Architecture	Items pertaining to architectural structures and styles including written works by architects.	House/building architectural drawings Images of architectural structures Notes or articles written by architects
Arts & Entertainment	Items pertaining to the artistic endeavors of authors, painters, sculptors and musicians and the influence of people and events on popular culture.	Actual works of literature, art or music (books, plays, paintings, sculptures, musical sound recordings, sheet music) Items about performance or exhibits Comic books Games Toys Musical instruments Movie Posters
Business & Industry	Items related to a business or industry in the form of photographs, promotional materials, advertisements, correspondences, records, equipment, and documents.	Main street/central business districts Individual stores and businesses Artifacts or tools used during production Advertisements for companies and products Items related to auctions Documents relating to the incorporation of a business
Community & Events	Items of or about everyday experiences in a community, community organizations, celebrations, parades (photographs, documents), newspapers, miscellaneous ephemera, or other community events.	Event photographs (e.g. of parades), brochures, announcements County fairs Newspapers
Daily Life	Items associated with the everyday experiences of people emphasizing their home and family life. For example: family, or	Items related to the home, family, or household duties or chores (cooking, gardening, children playing, life around the house) Family portraits Correspondence between family members

	household duties or chores (cooking, gardening, children playing, life around the house); artifacts, tools, household items, clothing, and recipes; holidays; images of children at play.	Artifacts, tools, household items, clothing, and recipes Holidays Images of children at play
Education	Items pertaining to general and higher education.	Teachers/students Elementary schools/high schools Colleges and universities Class photographs, images of teachers and students working, school sports teams, physical structures Documents (e.g. commencement announcements) Educators' or students' diaries Documents relating to the founding of a school or college
Environment & Nature	Items related to the natural world including environmental and conservation issues and images depicting nature and landscaped scenes. Images or documents relating to the effects of natural disasters.	Documents related to environmental history, human impact on the environment, and conservation Landscape or scenic postcards Images of gardens and landscaped grounds Images or documents relating to the effects of natural disasters (e.g. lightning, ice storms)
Ethnic Groups	Items about people of different ethnicities documented or identified as such (remember to assign a subject heading for the specific ethnic group in a Subject field). Images or documents relating to items/artifacts brought here by immigrants.	Photographs, field notes, and artifacts from archaeological excavations pertaining to a group such as Native Americans Images of art objects identified with a particular ethnic group Images or documents relating to items/artifacts brought here by immigrants Ethnic community newspapers
Geography & Maps	Includes maps and atlases; travel guidebooks; travelogue; bird's eye images of towns and cities.	Travelogues Zoning Maps, Tourist Maps, Topographic Maps Bird's eye view of a town
Government, Law & Politics	Items of or about government, politics, citizenship and law. These items can include information on or about government officials, meetings, activities,	Political candidates Political rallies Courthouses County and state office buildings Political records or artifacts Council minutes and legislation

	and documents (all levels of government, including local government). Political candidates and electioneering, and civic activities, as well as memorabilia.	<p>Writings of influential politicians</p> <p>Party meeting memorabilia</p> <p>Images of governors, politicians, and presidents</p> <p>Campaign paraphernalia and images</p> <p>Civil rights, civil obedience and government change</p>
Medicine, Science & Technology	Items related to pure and applied science, medicine, health, public health.	<p>Materials related to inventions and their impact</p> <p>Images or personal papers/personal objects of noted scientists/inventors</p> <p>Research notes; records of professional or academic groups</p> <p>Correspondence regarding scientific endeavors</p> <p>Hospitals</p> <p>Prescriptions</p> <p>Medical equipment</p>
Military & War	Items about military activities, facilities, objects and people.	<p>Photographs of soldiers, wars, parades, training, medals, uniforms</p> <p>Soldiers/veterans /veterans homes</p> <p>Letters to soldiers or from home front</p> <p>Broadsides or patriotic posters</p> <p>Documents</p> <p>Flags</p> <p>Weapons</p>
People	Items portraying individuals, groups of people including significant information about the lives and culture of individuals or groups of people. Group or individual portraits; personal documents (e.g., diaries, wills and obituaries). Genealogical information.	<p>Workers/employees</p> <p>Group or individual portraits</p> <p>Images of groups of people engaging in activities</p> <p>Diaries</p> <p>Oral history interviews; images of children</p> <p>Obituaries</p> <p>Wills</p> <p>Family records (e.g. genealogical information)</p>
Philosophy & Religion	Items about religious ceremonies and services or philosophical groups and documents.	<p>Photographs of churches, priests, congregations, and cemeteries</p> <p>Church records and other documents</p> <p>Missionary's letters or diaries</p> <p>Artifacts from religious communities</p> <p>Churches/congregations</p> <p>Church socials/picnics/church suppers</p> <p>Journals on Philosophy</p>
Recreation & Sports	Items about people's recreational activities	<p>Team and individual sports</p> <p>Hobbies/recreation activities</p>

	including sports, parks, picnics, and family outings. Memorabilia and equipment.	Trading cards Uniforms and sports equipment Athlete's journals Team photographs Brochures/announcements for recreational activities Images or documents relating to camps
Transportation	Items about various modes of transportation (automobiles, railroads, ships, horses, trolleys, and horse/buggy) and materials related to building highways, airports, bridges, and shipyards.	Airplanes/automobiles/trains /streetcars Boats used for transportation Horse and buggy /carts/wagons Catalogs of trains, cars or buggies Tickets for train/airplane rides Train stations
Work & Labor	Items related to people engaged in activities at work, documents, and artifacts.	Union records or photographs of workers Strikes Occupations